

Meeting Punch List



Below is a list of things to think about and consider when leading meetings. This list is situational depending on the type of meeting.

- Check room layout** – (circle, square, U, rows)...what will serve you best? Create the atmosphere, energy you want.
- Open with a Quick Check-In** – this gives you/everyone data, is a good barometer for trust on the team, teaches people to be concise, balances task-process-and relationships (the former 2 may dominate the rest of the meeting)
- Review agenda** – Show that there is a purpose for the meeting. Was agenda send out before the meeting? Does it have a time frame? Encourage the team to offer their ideas for agenda items before the meeting. Some agendas can be open Q&A only or partly.
- Notes** – Will someone be taking notes for accountability and in case someone is absent? How will this be shared/accessible?
- Responsibility and Participation** – Are you getting high participation/high collective IQ from the members present? Shift responsibility to the group. Track participation. To help, you can create a culture where participation is required to be a member of the team (you want them to all share their IQ). Get shy people to talk up and non-shy people to make space for the shy ones to talk. Soundings are a useful communication tool.
- Lencioni's Trust and Conflict** – Do you have a culture on the team of high trust and no fear of passionate, productive, respectful conflict?
- Lencioni's Commitment and Accountability** – Are you asking for commitments and holding people accountable?
- Decision Making** – Are you using situational decision making tools (for better decisions, collecting data, greater buy-in, commitment, accountability)? New Rule of Thumbs, Sundial Voting are 2 tools. Are you using consensus, majority rules, leader rules, a situational mix?
- Appreciations** – Are you appreciating the behaviors, actions, and leadership you want on the team?
- Multiple learning styles** – Is your team using more than one in their presentations? The best style may be a blend of auditory, visual, and kinesthetic. Auditory is usually the least effective.
- Close with a Quick Check-Out of some sort** – Did this meeting work for you, was it effective, how can we improve?, agenda items for the future, etc. This demonstrates that you are a learning organization, open to getting data, wanting to improve, asking for what you want, wanting the team to own it too.