MEETINGS ARE HARD,

but they don't have to be! Below are a few reminders of how we can lead effective meetings or discussions with large groups.

Do You *Really* Need a Meeting?

Avoid the Meeting Trap

It's really easy to throw a 30min meeting on a group of peoples' calendars and for a face-to-face conversation. But, before you take that step, you need to ask yourself an important question: **does what I need to discuss really require a face-to-face meeting?** We've all sat through meetings where we walked away and realized "*wait - did we just survive a 2-hour meeting that should have been an email!?*" Don't fall for the trap of *everything* requiring a meeting. Yes, it may seem easier at the time to just "get some time on the calendar", but it may not be the most helpful.

Ask The Right Questions

Ask yourself some basic questions to help determine whether or not your meeting should actually *be* a meeting.

Do I need to just inform others or give a status update?
If all you need to do is disseminate information to others in your group but you don't need an in-person discussion on the topic, try to share your update or other information concisely through an email.

Is there new information to discuss since our last meeting?
Oftentimes, people will preemptively schedule follow-up meetings to their meetings. However, don't feel like you need to meet if there is no new information to discuss or no progress has been made since the last meeting. Here's a little known secret: *it's OK to cancel a standing meeting if you don't have any new items of business!*

Does this topic require an in-person discussion?
Not every decision requires a face-to-face conversation. There are some topics that could easily be discussed and a decision made through other real-time communication channels such as Microsoft Teams or Slack. Save meeting times for discussing topics or problems that could easily get off track through instant messaging or email.

Are you soliciting input or feedback from others?

If what you're looking for is feedback on an idea or a problem, consider using an asynchronous communication channel such as email. Unless you want to distill everyone's feedback in real time and want the group to decide on an outcome or action, email may be a better channel to collect feedback. This will also help prevent groupthink if you encourage folks to *only* reply to you and not reply all.

Before the Meeting

Give Context in the Invite

There's nothing worse than a meeting invite that just has a title. Chances are, someone in your group is an introvert or needs some time to process their thoughts before coming into a group setting. **Try to send some information along with the calendar invite**—even if it's just a few bullets outlining why the meeting is happening or your overall goal. For meetings that may require detailed technical conversations, provide the group with any technical information ahead of time and make sure everyone is coming to the meeting with the same base-level understanding of what's being discussed. As much as possible, give people the opportunity to ask questions and gain understanding ahead of time.

Share the Ground Rules

Don't want people to be on their laptops or phones? Tell everyone. In a study by Wolf Management Consultants, they found that *73% of workers admitted to doing their work in other meetings*. **If you don't want them working on other things, tell them!** The same goes for any other expectations you may have as the facilitator. If you don't share your expectations, you're going to walk away disappointed. For larger groups that may require in-depth design or architecture discussions, it's also helpful to outline any other rules of engagement at the beginning of the meeting (things like "we're not going to get into the nitty gritty—stay high-level."). Let them know if you'll be limiting discussion times for topics, if you want to hear from everyone in the room, etc.

Create an Agenda

Whether you're creating the entire agenda yourself or allowing others to add topics, you need to have a basic agenda outlined. **Agendas are necessary to keep meetings on track and make sure you're accomplishing what you actually set out to accomplish.** Can't think of an agenda or don't have many items on an agenda for a weekly sync meeting? Well, you should probably think about canceling that meeting and regrouping later.

During the Meeting

Introduce the Players

Believe it or not, some folks may not know someone else sitting across the table from them. Take a few minutes at the beginning of the meeting to **ask a simple question: "Does everyone know everyone in the room?"** If not, then take a minute and ask everyone to share their name, the team they work with, and—if relevant—what their focus is. For example: "Hello! My name is Ryan, I work on the XYZ team, and I've been developing some platform pieces for our Content Management System." This will help people not only know *who* they're engaging with, but it typically helps set the stage for folks to engage more honestly in conversation.

Recap Why You're Meeting

More often than not, there will be some folks sitting in the room who don't have the full context of what's going on and what the goal is of the meeting. Yes, you may have sent it in the invite, but some folks will accept and just show up. **Before you begin discussions, make sure everyone is on the same page and understands why you're meeting.** This will help set expectations before the discussion begins and help everyone understand the common goal.

Don't Let the Loudest Voice Take Control

There's a good chance that one or two folks in the room will begin to seize control of the discussion if left to their own devices. It's not that they're inherently doing anything wrong, it's just very easy to be outspoken if you have a strong opinion or are an expert in the subject matter being discussed. As the facilitator, **make sure every voice has a chance to be heard.** Sometimes, this even means that you'll need to politely interject at times to help re-steer the conversation and even explicitly ask some of the quieter folks in the room to share feedback.

Avoid Groupthink

If you're trying to get ideas out of the group, use Post-Its, notepads, or any other method you can think of to try and capture individual thoughts. **Ask folks to write down their ideas, then go around the room individually and have people put their thoughts on the board** or have them share verbally while you collect their papers. During the sharing time, ask the room to politely refrain from any feedback of other folks' ideas. This isn't the time to squash.

Stay on Task

Rabbit holes are easy to go down, but it's your job to make sure the group doesn't go off-topic. **If you feel that a discussion is beginning to shift outside of the original goal, speak up, re-focus the group, and bring the room back on point.** This can especially be a time killer if you're trying to time-box specific portions of the meeting for very focused discussions.

Capture the Overflow

Feel the group going down a rabbit hole that's important, but maybe just not pertinent for today's conversion? **Create a "parking lot" document or spreadsheet where you can capture important discussions** that may need to be resurrected outside of the current meeting at a later time. If you don't write it down, you're going to forget them.

Draw Boxes and Arrows

It's easy to *think* everyone is in agreement with a direction or decision when you're just discussing it. As often as possible, **try to bring clarity by supporting the discussion with visuals**. For technical design meetings, this is critical to ensure that everyone understands what's being considered. As the facilitator, don't hesitate to grab a marker and start drawing on the whiteboard any time you feel there may be a hint of a disconnect within the discussion.

Get the Last 10%

Chances are, you have some internal processors in the room. But as the one leading the meeting, it's your role to ensure that both the internal and external processors have a voice in the discussion. The first step to this is keeping the 5% of the room who is more outspoken from controlling the conversation for the other 95% (see that point above). The second is to **pause at the end of a conversation and leave a few minutes to ask explicitly for any last, lingering thoughts**. Look around the room, make eye contact with folks who haven't been speaking, and make sure their voices are heard. Nudge them by name if you need to.

After the Meeting

Take Action

What did you decide during the meeting? What questions still need answering or what work needs to be completed? **Unless you explicitly write down action items, set a timeframe, and then follow up with those who should be taking action, it's probably not going to happen**. Try to send out a communication to the entire group within a few hours after the meeting to summarize what was discussed, outline any action items for the group, and give space for folks to email you anything that you may have missed.

Follow Up on the Action Items

Don't wait two weeks to schedule any follow-up discussions. **If there were important action items with agreed upon deadlines, schedule the next meeting for that deadline.** If those deadlines are more than 2 weeks away, send out a reminder 1 week prior to the deadline to make sure folks are aware that the deadline is coming up.