The FewerFasterBolder Super Clear Meeting Invitation Template

Hello, hello,

Here's the clearest, simplest way to get everyone on the same page – crucially *before* a meeting.

Differences in expectations are much harder to deal with once you're in the meeting. This template helps you get clear together with time to refine or adjust if you need.

Sometimes, it's most helpful if you agree all the elements of scope *together*. It's an engagement and alignment exercise in its own right. Sometimes, you need to set the scope yourself and then use the invitation to check if others agree. You'll need to make a judgment call on where to land on this spectrum. The pr-invite is a good way to gather thoughts before you write the invitation, and an example is included.

You don't need to use every element of the invitation template. And of course, you can add more. Just use it as a springboard.

Let's get meetings working for you.

With my best wishes,

Carrie

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The invitation template

To:	[Those meaningfully affected / with expertise]
Subject line	Invitation: Meeting name

Body of email	[greeting]
	
	The purpose of this meeting is to …
	
	As you know, this project is about …
	
	Questions we'll tackle in this session include…
	
	I'd love you to …
	
	In this session, we'll decide … by …
	
	We will…
	    -
	
	But we won't…
	    -
	
	How does this sound?
	
	Come ready to…
	
	Links that might help you prepare: <u>this document</u>, <u>that document</u> and <u>this website</u>.
	
	[sign off]

IDEAS: consultative invitation wording

"I'm proposing this as a plan for the meeting - how does that sound?"
"Have I understood what we'd like to get out of this session?"
"Does anyone have thoughts on how we might tackle this meeting?"

EXAMPLE: a meeting invitation for help two teams work better together

Hi everyone,

The purpose of this session is to explore how we can make it easy to work together on Project X and contribute more to break even this year.

In this session, we'll explore together:
1. What would easy look like?
2. How does each time prefer to work?
3. What changes would make it easier to work together?

We will:
- Explore how we'd ideally like to collaborate
- Better understand each team's approach
- Agree helpful and obvious changes

But we won't:
- Address every issue in this session

How does that sound?

So that we have the most helpful conversation, could you all make some notes on the best opportunities for making it easy to work together. Be as specific as possible and come ready to share your points.

Best regards, Sandhya

THE PRE-INVITE: to help you align with people before the invitation goes out

We're planning a meeting to [explore/decide/better understand/address/look at/align ourselves on] X.

Your thoughts on the following would be warmly welcomed (choose 2-3 questions that are most helpful for your meeting?).
- What questions should we be addressing?
- What should we be walking out of that meeting with?

- What is best possible use of our time?
- What *shouldn't* we do in that session?
- What do we need to bring with us / prepare / come ready to talk about?
- Who should absolutely come to this session?

LANGUAGE

Avoid vague and unclear words
that mean different things to different people
like:

Discuss
Talk about
Cover

Instead, use clear, active verbs
that define the session, like:

Explore
Get your insights on
Problem solve
Understand
Get clear on
Share information on
Evaluate options for
Decide (if that's what you really mean)

Use overly formal words with caution
like:

Minutes
Chair
Agenda
... and even meeting (consider "session")

Instead, consider less formal words
like:

Decisions and actions
Session leader
Session plan