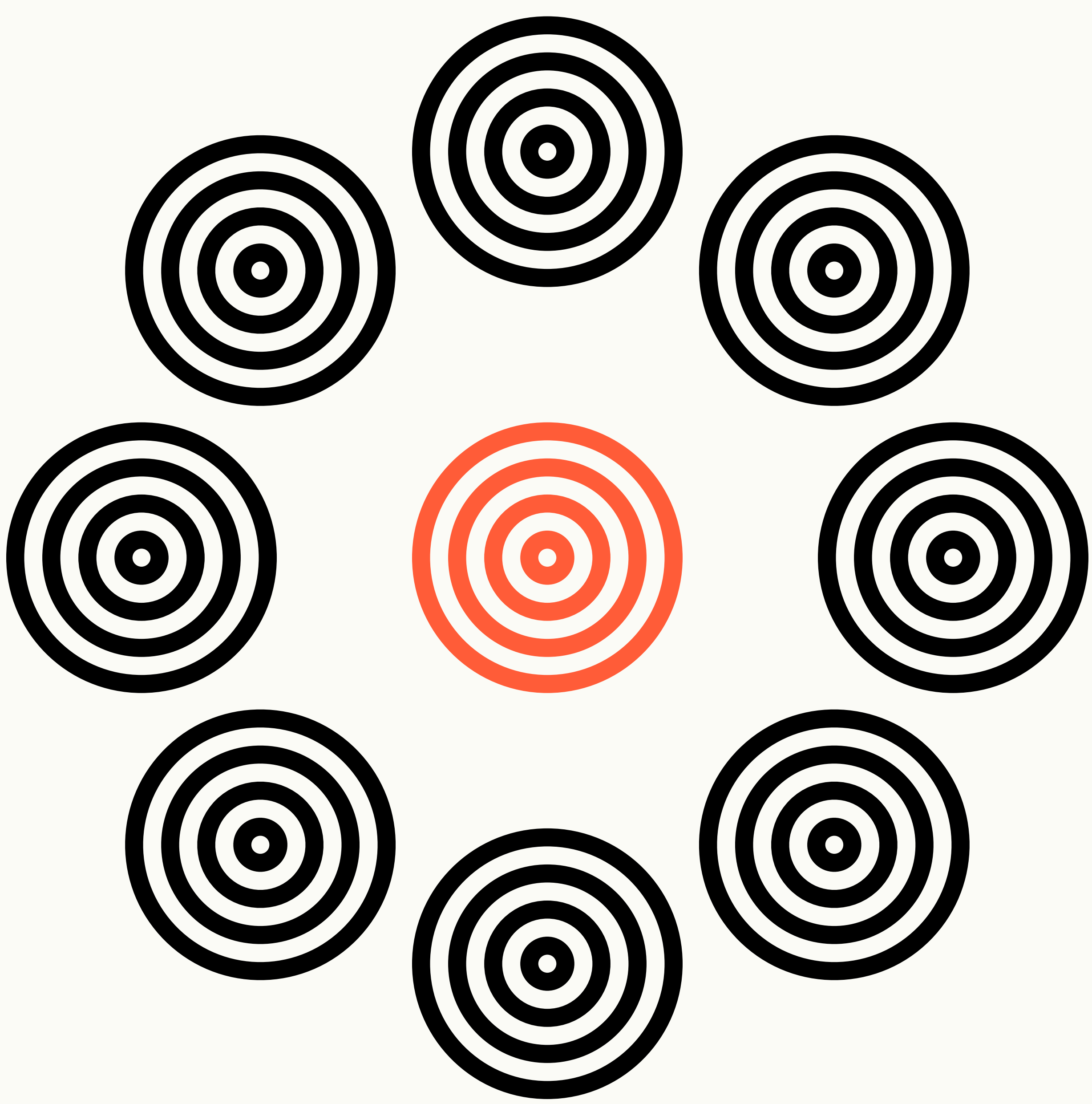
How to run a smart meeting

A Louder Than Ten guide



Here's a handy little guide to running your meetings like a gazelle—quickly and without being tackled by a bloodthirsty, hairy mob.

Helpful tips

Your time is precious
Nobody has the right to book you into a meeting without first making sure you should be there. In other words: you can decline meetings that are useless, time consuming, don't have an agenda, or happen out of work hours or over lunch. We dare you to try it. Your time is the only thing you have. Don't give it away for free.

PMs don't take notes
That's right. They might run the meetings, but they ask someone else to take the notes. This is because our brains are incapable of tracking important information while also directing conversation, keeping convos on track, and referencing project details at the same time. A note taker has the important job of documenting decisions and threads. They can also track time.

No distractions
No laptops, cellphones, or Tinder apps. The notetaker can have a laptop, and the PM can reference project data, but keep offline meetings offline to keep people caring about your silly meeting, and meetings about assets online (there are lots of great tools and resources that can help you keep your decisions and assets searchable).

Everyone gets a turn
The quickest way to make a meeting meaningful is to give your eager participants the microphone. Now this speaking time should be about equal: some people are rhinos and like to dominate meetings and poop all over other people's ideas. It's up to the PM (or meeting chair) to keep those ones in check.

Helpful tips

Keep 'em focused
The best meetings are ones that revolve around a single issue or two. You're more likely to sort through things when you work through a project related topic with clear outcomes. So, don't cram your agenda with six topics. The golden rule is three topics (and no more than four). That's about equivalent to the number of major tasks you can accomplish in a day. So don't push your luck.

Keep 'em short
Meetings keep us informed and help us make decisions—or at least that's what they're supposed to do. Most of the time they drag on till we start sprouting chin hairs. Make your meetings valuable: short and to the point. Don't be a jerk and keep people in an hour long meeting when all you needed was a fifteen minute check-in. Trust us, you won't be getting a Valentine's card this year if you do.

Keep things on track
If things start to go off the rails, isolate what happened, when it happened and who caused it. Most people don't know they've tossed in a stick of dynamite and don't mean to derail conversations. Ask the culprit(s) for their help and tell them you need their eyes and ears to keep things running smoothly. Focus on the bright spots and make clear goals for how you want the behaviour to change.

And now for the process...

Meeting chairs

A chair sets up and runs the meeting. Cool beans.

1. Schedule the meeting

Meetings are expensive. So ask yourself—do we really need this freaking meeting? Is it worth the cost (# of people x # of hours x $xx)? Should we stick to email or another tool instead?

- Ask yourself why you need the meeting. If you can't outline the reasons in your head, make sure you do before you even type the first letter of your participants' names.
- Don't expect people to be available less than a day from your request—24 hours notice at least (this goes for client meetings if they ask you, too).
- Don't schedule meetings at lunch or before or after work hours. Jerk move.
- Check each participant's calendar. Check with people who have time conflicts. Don't double book people.
- End meetings at least five minutes early. It gives people time to go to the bathroom before their next meeting or come talk to you if they have questions.
- Outline your goals for the meeting and make sure to include them in the invite. **People can say no** to your stupid meeting if you don't tell them why they need to be there.
- Invite necessary people; mark others as optional so they can decide if it makes sense to attend.
- Don't be an overzealous meeting jockey. People don't like meetings and might be busy even if their calendars are clear.
- Book meetings through a standard calendar (like Google's). Sometimes the formatting and updates don't translate properly and people miss important info.
- Put those time zones into your meeting invites.
- Stick to a standard channel for both video conferencing and voice calls.
- Cancel unnecessary meetings. It'll show up on your invitee's calendars so they know their schedules are free. Tell them why you cancelled it.
- Keep it short. If you can't accomplish what you need in the time you booked, end it and schedule a follow-up.

2. Set the agenda

Send out meeting invites in plain text (in the description field). Don't send agendas out as Word or PDF documents, because people are often procrastinators and won't usually click and read them till minutes before the meeting. Then you'll get that deer in headlights look and have to reschedule the damn thing.

Your agenda should cover the following:

- *Goals*: Why are we having this meeting? What will we accomplish? Why would I come, and if I can't make it, what would I miss?
- *Prep*: What should I do beforehand, what should I bring to the meeting? For example, if you want people to review version one wireframes, attach them to the meeting invite (or send a follow up in your CRM). Note: Attaching documents to a Google Calendar invite can be awful. You have to upload them in Google Drive, then update permissions so the right people can view them. Tell people what you need from them so everyone shows up ready.
- *Outline*: What are we going to talk about? If it's not in the agenda, it's not part of the meeting. Tie these items to the 'why' of your meeting. If they don't link, don't talk about them. Make them clear and concise. Even better? Add approximate time limits on each item to keep things rolling.
- *Payoff*: What do I get out of it? What will I get at the end? What should I contribute?
- *HINT*: Give people the time tracking client/project code so people know how to mark their time.

3. Run your meeting

- Make sure you've got someone good and ready to take meeting minutes.
- Show up **five minutes early** to set up. Last minute issues always happen. Best to work it out before everyone sees you struggling and give you pity glances.
- **Start and end on time**. If people stride in late, don't wait and don't recap when they get in. They can get the notes/updates afterwards.
- If key people aren't aren't prepared and are wasting time, **end it and reschedule**. You'll get more out of a future meeting when people are ready to go.
- Include breaks if you have a long meeting planned.
- Check for eye contact to make sure you have people's full attention.
- Facilitate the chatter to maintain focus. Get everyone contributing and shut down hijackers.
- **Maintain focus**. If the team starts yaking about something unrelated, anyone can call out "off topic." Or use your best project management voice and say, "let's talk about that in a future meeting; we need to get through this first."
- Let people leave the room if they have other commitments or you don't need them anymore. They will secretly love you for it.
- People love it if **you summarize the results of the meeting**. Did you meet the goals? Who is doing what? What are the next steps?
- Always **end on time**. Don't drag on a meeting to get through an agenda. Follow up with another meeting offline or via email.
- On the flip side, if you've barrelled your way through the objectives, don't be afraid to end early. People adore that.

4. After the meeting

- Be nice and clean up the room. Remember to turn off projectors and other expensive things and don't hide remotes on people.
- Remove thumb tacks from seats.
- Share your meeting minutes in one place where everyone can see them. We just happen to have a nifty little template for you here to do just that.
- Create clear tasks out of action items listed in the meeting. People often forget things if you don't link them to the workflow they normally follow (i.e. put all tasks in one place).

Note takers

Notetakers are the prime ribs of your meeting. They're the ones that make sure what you said and what someone else heard was the same thing. Treat them well. Arm them with the best ink.

Make the best of your minutes

- Use a standard file naming convention for meeting minutes. For example, Acme_UI_meeting_2013-02-25
- Identify decisions you agreed upon (ex. [Jen S.] decided [we should tell the client we'll need two more days])
- Identify action items: aka who needs to do what, when, how. One person may have multiple actions, but every action must be tied to at least one person.
- In some cases (such as brainstorming sessions) it may make sense to have multiple people contribute to the minute if they can be shared virtually.
- If you have recurring meetings, try one running document or single Trello board (per client/project) for meeting notes.
- Complete and post meeting minutes ASAP after the meeting.

Participants

This is everybody else—all the folks who gave up an hour of their lives to sit in a windowless room with you. So treat them extra nice and buy them coffee afterwards. They will need it.

Rules of engagement

- Keep your calendar up-to-date and let the right people know when you'll be in Disneyland or at the dentist.
- Go to **two meetings per day** maximum. Otherwise, you'll be so worn out, you won't have any energy. Plus, you'll have no actual time to work on anything.
- Read the agenda in the invite to make sure it's relevant to you. If not, don't go.
- Respond to the invite. If you can't make it or you don't need to be there, respond with "no" and include a reason. Not like: "My baby turtle has the hiccups," but something relevant.
- **Be prepared.** Do your homework before you show up. There's no point to meetings if people are sleeping or unprepared.
- Arrive on time. The meeting will start with or without you and there won't be time to recap if you're late.
- **Check your ego at the door.** People might have things to say that conflict with your view. That's healthy conversation so long as it's not a personal attack.
- Pay attention. If you don't need to be there, ask to sneak away.
- Leave your laptop, cell phones or other devices at your desk. They just distract you.
- If something else is nagging at your brain, go deal with it before you show up to the meeting. Nobody likes your absentminded 'hmms.'
- Help keep things on track by calling "off topic" or "nachos" or some other agreed upon phrase to loop the conversation around.
- Check your tasks following the meeting and review the notes to make sure you didn't miss anything.

Take a bow.

You have now successfully planned, scheduled, and partook in a meeting.

Wait, you haven't? Well, go back and read this whole thing over again, and if you're still having trouble, you should probably get in touch.

Acknowledgements
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