Guidelines for Effective Team Meetings

Agenda – always have one! For the first meeting, the initial agenda can be developed in the first part of the meeting. If there is a team leader, they should facilitate the discussion. If there is not, the team should agree on one member to facilitate the discussion. This facilitator can be permanent or rotating. If it is rotating, the facilitator for the next meeting must be agreed upon before the end of the current meeting and explicitly noted in the minutes of the meeting. Another extremely important role is the person responsible for the minutes of this meeting (i.e., taking notes). Note taking is extremely important for avoiding misunderstandings. The minutes should be distributed the day after the meeting. The minutes should highlight what was accomplished in the meeting and provide the basis for the agenda of the next meeting – who is responsible for accomplishing what for the next meeting. The agenda for the first meeting should roughly follow the questions asked about the IDEO video. Namely:

1. Does everyone understand the objectives of the project? What are the specific deliverables and what constitutes a high quality product?
2. What is the deadline (or deadlines) for this project?
3. What milestones should be established and the deadlines associated with each milestone? Establish a norm of “no slippage on the milestones.” At the same time, are there any milestones where slack should be built in? Also, how is the team going to celebrate milestone completion – build in fun to celebrate progress!
4. What are the specific tasks associated with each milestone? Who specifically will be responsible for each task (the task leader) and who specifically is going to work together with the task leader? These questions for milestones other than the initial milestones can be answered at subsequent meetings as each milestone is met.

Importantly, spend time in each meeting discussing how all the tasks fit together and how each task relates to the others. Each team member should share the key things they have learned with the other members from their role in the project. Remember, each team member will be assessed in terms of how they helped the other team members learn!

Before concluding the meeting, explicitly review what was accomplished and agreed upon. This step is crucial! Review who is responsible for accomplishing what for the next meeting. Establish the date, time, and place for the next meeting. Also, establish who will take the minutes at the next meeting.

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Future meetings: before, during, and after…

_Before the Meeting_
Before you schedule a meeting you decide if anyone from outside the team should be present for the meeting and what their role will be. The team leader should always send an agenda to the team at least two days before the next meeting. Team members should recommend additions to the agenda or any needed clarification. The agenda should include:

1. The order of items to be discussed (don’t save critical items for last!).
2. Who is responsible for leading the discussion of each item.
3. How long that item will be discussed. Build in time to share what was learned since the last meeting. The team should explicitly discuss how each item relates to the work of others on the team.

_During the Meeting_
Encourage questions, comments, and clarification. Encourage sharing new ideas. Make sure everyone is participating (speaking in the meeting)! Don’t criticize, improve upon! In speaking, don’t say, “yes, **but...**”, instead say, “yes, **and**”!

Establish the norm that team meetings are sacred – no interruptions, cell phone calls, etc.

Keep to the agenda! If some team members feel a need to “warm up” by talking about the weather, etc. – they should come early and do it before the meeting. Start on time and stick to the agenda!

Remember – never end a team meeting without review who is responsible for accomplishing what for the next meeting. Always establish the date, time, and place for the next meeting.

_After the Meeting_
Whoever is responsible for the minutes should get them to the team members the next day.

Enjoy the effectiveness of your team!