

THE 4 BUILDING BLOCKS TO A GREAT MEETING

A Checklist for Facilitating a Successful Meeting

1. SUCCESS STARTS WITH PREPLANNING

- Define the desired outcome of the meeting.
- Identify the “win” for everyone in attendance.
- Agree on the decision-making process in advance.

2. UNDERSTAND YOUR MEETING STAKEHOLDERS

- Clarify the needs of those in the meeting.
- Agree on the stakeholders’ role in the meeting.
- Define your stakeholders as advocate or a challenger in the meeting.

3. MANAGE TO AN AGENDA

- Develop an agenda.
- Share the agenda in advance with all participants to set expectations.
- Only develop your agenda after you have clarified your meeting objectives and the process for gaining alignment and agreement.
- Plan for how you keep the meeting from getting off track.
- Prepare for what you need to do to help the meeting participants regroup should the meeting go off track.

4. UNDERSTAND THE ROLE OF THE FACILITATOR

- Clarify whether you are meeting leader only, or also a participant. Your involvement in the outcome of the final decision will influence other’s perceptions about your objectivity.
- Ensure that all voices are heard and considered during the meeting.
- Capture all critical dialogue and agreements made during the meeting. Share these back with the participants in formal meeting minutes.

**To understand more about how to drive a successful meeting contact:
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