



# MASTERING MEETINGS: HOW AN AGENDA LEADS TO SUCCESS

A 60-MINUTE WEBINAR



One of the least-used and most beneficial tools to ensure a successful meeting is a good agenda.

- 1) Prepare an \_\_\_\_\_ and forward to participants far enough in advance to allow them to prepare and/or ask questions.

The agenda should include:

- Date, times (start and end times), location
- Participants expected to attend; any assigned roles/to whom (leader/facilitator, note taker, parking attendant, time keeper, etc.)
- Topics to be discussed with a tag as to what category each topic is in:
  - FYI
  - For discussion and feedback
  - For developing a plan with action steps
  - For a decision
  - For brainstorming
- \_\_\_\_\_ allotted to each agenda item
- \_\_\_\_\_ responsible for each agenda item
- Any items participants should bring to the meeting:

\_\_\_\_\_

- 2) The agenda can be used as a starting point for the \_\_\_\_\_.

- 3) When developing a thorough agenda, consider using a \_\_\_\_\_.

## SAMPLE WORKSHEET FOR AN AGENDA FOR YOUR NEXT MEETING

Why? \_\_\_\_\_

Who? \_\_\_\_\_

\_\_\_\_\_

When? \_\_\_\_\_

Start and End Times? \_\_\_\_\_

Where? \_\_\_\_\_

Topic	Priority	Desired Result	Person Responsible	Time Allotted	Method to achieve results
					<i>Examples:</i> Disc. and Feedback
					Brainstorming
					FYI

Other notes: \_\_\_\_\_

- 4) Recognize that the agenda provides a guideline; although there are times you may need to be \_\_\_\_\_, don't use that as an excuse for the meeting to ramble.
- 5) Decide in advance which \_\_\_\_\_ you want to use to achieve the objectives you have set for the meeting:
- FYI – leader shares information, usually allowing time for Q & A at the end of the meeting
  - For discussion and feedback – take turns around the room, allowing time for each person to express his or her opinions
  - For developing a plan with action steps – once discussion results in a decision, the leader solicits volunteers for action steps or assigns them
  - For a decision – to assess support, each attendee uses a certain number of “votes” from the total number they have been allotted to show support for more than one idea being presented (example: each attendee is given 10 votes; they can use 6 votes for one idea, 3 votes for another idea, and 1 vote for a third idea)
  - For brainstorming – mind-mapping, making lists, passing the ball, etc. to create ideas
- 6) What are some of the benefits of an agenda?
- a) sets \_\_\_\_\_
  - b) acts as a guide to make sure all \_\_\_\_\_ are covered
  - c) clarifies \_\_\_\_\_
  - d) keeps meeting \_\_\_\_\_ and \_\_\_\_\_
  - e) fleshes out \_\_\_\_\_ to be handled later
  - f) assigns \_\_\_\_\_
  - g) encourages \_\_\_\_\_
  - h) sets the \_\_\_\_\_ for projects, decisions, etc.
  - i) eliminates \_\_\_\_\_
  - j) gives everyone an opportunity to \_\_\_\_\_
  - k) establishes an \_\_\_\_\_ of discussions and decisions
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7) Although an agenda is critical, make sure it doesn't cause undue \_\_\_\_\_.

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8) An agenda is not meant to be \_\_\_\_\_.

Do you use agendas consistently? How do you make your agendas effective?

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**Notes to self: What are TWO things I will do differently to make sure my agenda aids in holding a successful meeting?**

1) \_\_\_\_\_  
\_\_\_\_\_

2) \_\_\_\_\_  
\_\_\_\_\_

**Which sections of this agenda example might be helpful when planning your next meeting?**

## Team Meeting Agenda

[Date]

[Time]

[Location]

**Meeting called by:**

**Type of meeting:**

**Facilitator:**

**Note taker:**

**Timekeeper:**

**Parking Attendant:**

**Attendees:**

**Please read:**

**Please bring:**

### Agenda Items

TOPIC	PRIORITY	DESIRED RESULT	WHO	TIME	HOW
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✓

✓

✓

✓

✓

**Other Information**

**Observers:**

**Resources:**

**Special notes:**

Which part of the “meeting minutes” template can you incorporate at your next meeting?

**MEETING TITLE**

MINUTES

[MEETING DATE]

[MEETING TIME]

[MEETING LOCATION]

MEETING CALLED BY	
TYPE OF MEETING	
FACILITATOR	
NOTE TAKER	
TIMEKEEPER	
ATTENDEES	

Agenda topics

[TIME ALLOTTED]

[AGENDA TOPIC]

[PRESENTER]

DISCUSSION		
CONCLUSIONS		
ACTION ITEMS	PERSON RESPONSIBLE	DEADLINE

OBSERVERS	
RESOURCE PERSONS	
SPECIAL NOTES	