

Meeting Management

Efficient meetings are rare, but yet it's easy to achieve them – just follow 4 simple steps:

Plan > Prepare > Execute > Follow-up

The information from the steps can be stored in one single document.

There are a lot of inefficient meetings. Most, if not all, have after a meeting asked themselves – “Was it necessary for me to be there at all and will this meeting have any effect?”.

The basics for efficient meetings is the following steps:

1 – Plan

Write an agenda, with expected output.

The agenda should also give the participants information about:

- who they will meet (incl. organizer and author of notes)
- what to discuss – decision meeting or information only
- what is expected by them (times and content needed)

Invite the minimum amount of persons needed (some might just be there for part of the meeting).

2 – Prepare

The meeting should be scheduled so that the participants have time to prepare according to the agenda.

3 – Execute

The organizer will keep the times and assure that the meeting will end up with the expected outcome. *Tips! Park matters not relevant for the expected outcome and plan a new meeting about them with relevant persons.*

The (meeting notes) author's most important task is to assure that all actions have agreed deadlines and a responsible person.

4 – Follow-up

The organizer is responsible to distribute the meeting notes and follow-up on all actions. *Tips! Keep a log of all actions and decision taken in one document, and have the meeting notes as support.*

Agenda & Meeting Notes template

The planning, preparation, execution and follow-up could be stored in one single document:

1 – Plan
2 – Prepare

3 – Execute

4 – Follow-up

UNIK Partner
Date: 180820
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Meeting: 1 Project Project™ Meeting

Time: **2018-08-20 10:00-10:50**
 Place: **Uppsala, Sweden**
 Organizer: **Martin Tilly**

Participants:

- Martin Tilly (UNIK Partner)
- John Smith (External consultant)

Not present:

- Carl Adams (Procurement) – stuck in traffic

Author of meeting notes: **Martin Tilly**
 Approval of meeting notes: **N/A**

Pre-read: **No pre-read was sent out**

Agenda:

1. General update (Martin Tilly, 15 min)
2. Presentation of change requests (John Smith, 15 min)
3. Discussion about change request (all, 10 min)
4. Decision and wrap-up (Martin Tilly, 10 min)

Expected outcome:

1. All participants are update
2. Decision on change request

Meeting notes:
 Notes from the meeting...

Decisions from meeting:

Id	Date decided	Decision	Decision impact	Decided by
1	2018-08-27	Project change request approved	Marketing communication affected - All persons producing marcom material needs to be informed.	Martin Tilly

Action list:

Id	Date decided	Action Agreed to be performed	Responsible	Deadline Agreed to be completed by	Closed Actual completed date	Status/Comment
1	2018-08-25	Inform about suggested change request	John Smith	2018-03-27	2018-08-27	
2	2018-08-27	Execute change request	John Smith	2018-08-25		Ongoing

It is however recommended to copy all decisions and actions in to separate registers after the meeting making it easy to follow up the items:

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	ACTION register	1 Page Project™	Current date:	2018-10-04		
Id	Date decided	Action Agreed to be performed	Responsible	Deadline Agreed to be completed by	Closed Actual completed date	Status/Comment
1	2018-03-25	Inform about suggested change request	John Smith	2018-03-27	2018-03-27	
2	2018-03-27	Execute change request	John Smith	2018-09-25		2018-03-27 Working on this right now/JS
3						
4						
5						

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