

Management Checklist

Handling Effective Meetings

This is an excerpt from a [Chartered Management Institute](#) checklist providing practical advice and guidance enabling managers to check out how to do a range of tasks quickly and efficiently using concise, tried and tested information.

Introduction

The general principles for holding successful and productive meetings are valid for all types of meetings, whether traditional, face-to-face or electronically linked, and regardless of their outcomes, purpose, number of attendees, style, duration or level of representation.

Definition

The face-to-face gathering of three or more individuals for a specific purpose at a specific time and place. Formal meetings, such as those covered here, are conducted by a chair, according to an agenda set in advance, and the proceedings may or may not be minuted.

Action checklist

1. Before the meeting

Ask yourself 'Do I really need a meeting?' before committing the time, effort and other costs involved. Consider what the purpose of the meeting is. It may be to exchange information, monitor progress on performance, or to deal with specific problems.

Choose a date, starting and finishing time, and place that is suitable for all intended participants. Having a definite finish time helps concentration and may help avoid time-consuming digressions.

Set the agenda: for each item clarify the objective and who will lead the discussion. Construct a timetable so that important items do not get squeezed out and lesser items do not absorb a disproportionate amount of time.

2. At the meeting the Chair/leader should...

Arrive in good time and welcome the participants on arrival. Make sure you start promptly and begin by dealing with administrative items, such as domestic arrangements, the introductions of any newcomers and apologies received from absentees.

Shape and control the discussion. Do this by making sure you:

- √ encourage the shy
- √ restrain the verbose and opinionated
- √ allow only one discussion topic at a time
- √ separate different subjects
- √ balance contributions on contentious subjects
- √ keep control of time
- √ summarise at intervals
- √ seek clear decisions at the appropriate point
- √ agree date and time of any follow-up meeting
- √ thank everyone for their contributions

3. After the meeting

If not already minuted or recorded, write down immediately the decisions taken, the tasks agreed with the persons responsible for action and the dates by which action should be achieved.

Distribute the note to all participants and to others as appropriate and then monitor the progress of subsequent action/s.

The full [Management Checklist](#) is part of a series offered by the Chartered Management Institute, that focuses on issues relating to people management and personal effectiveness. The full checklists are freely available to all [members of the Institute](#). Further information can be obtained by calling (0)1536 207 373 to request a sample of what the Institute has to offer.