

The 4-Part Checklist to Running Effective Team Meetings Without Losing Your Sanity

Follow these steps before, during, and after your meetings to save time, stay sane, and get more done.

PRE-SCHEDULING



Before you schedule a meeting, ask yourself or your team the following questions:

1. Is there any way this can be accomplished asynchronously, without a call?

YES

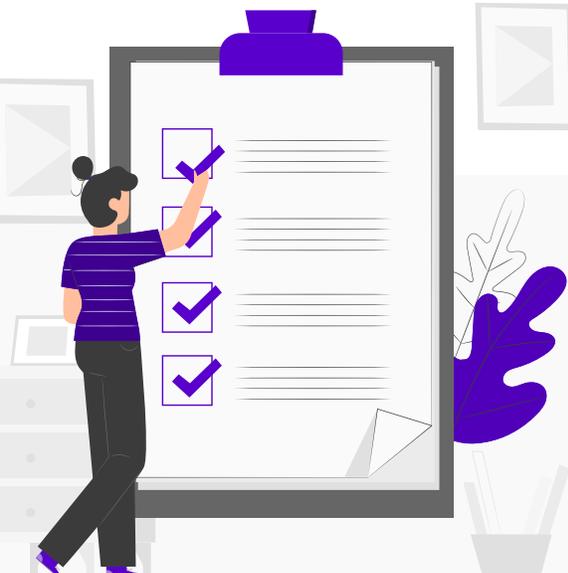
Add it as a task within your [work management tool](#) and use comments or video recordings to update stakeholders. Congratulations, you just eliminated an unnecessary meeting!

NO

2. Who actually needs to be on this call in order to accomplish what we've set out to do? Is there anyone who doesn't need to be there?

3. What is the most appropriate and/or shortest length of time we need to cover everything in this meeting?

Schedule the Call



PRE-SCHEDULING

- Create meeting agenda
- Share meeting agenda with all attendees and add to calendar invite
- Assign and complete all pre-work in a work management tool like Asana
- Allocate time to each agenda item
- Assign the relevant person to each agenda item
- Assign a meeting leader and notetaker

DURING THE MEETING

- Record the meeting
- Enable your camera
- Mute yourself when not speaking
- Follow the agenda
- Avoid rabbit holes by sticking to agenda time slots
- Review action items at the end

AFTER THE MEETING

- Ensure all action items are documented and prioritized in your work management tool
- Add additional notes to the meeting notes document if necessary
- Store meeting notes in a central, organized place that everyone has access to
- Share link to the recording and notes with all attendees
- Share link to the recording and notes with team members who are involved but did not attend

Want to see how Leverage can help your organization save time and money?

Schedule a free consultation call