How to prepare agenda for a meeting

A project manager holds meetings with internal project team members regularly to discuss her current projects. Additionally, a project manager may facilitate meetings with project stakeholders, executive management and clients to kick off a project and may hold ongoing meetings to provide updates on her projects and answer questions about timelines and budgets. Preparing for each project meeting is key in making beneficial use of both your time and that of the meeting attendees. Invite the appropriate individuals to the project meeting. Determine the goals you need to accomplish at the meeting based on the invitees. If meeting with project team members, you may set goals of obtaining status updates, resolving internal issues and having the team members share information with one another about the project. If meeting with project stakeholders, executives and clients, your goal is to provide general milestone updates and answer questions. Solicit agenda topics from the invitees several days before the meeting. Rather than dodging a surprise curve ball at the meeting, ask for questions and discussion topics from those connected to the project. This will allow you time to prepare and invite others who can support you at the meeting. Anticipate what invitees will want to hear and discuss regarding the project. For example, if you know the clients want to discuss marketing materials, get updates from your communications department and invite a representative to the meeting. Create a formal project meeting agenda. List the meeting details such as meeting name, date, time, location and conference call number at the top of the page. List agenda topics such as status of project milestones; status of functional business areas such as IT, marketing, legal and other relevant departments; project budget; next steps; and any topics suggested to you by others. Send all invitees an electronic meeting invitation and agenda. Include a project plan or status report to accompany your discussion on status and timeline. Send the invitation as early as possible and follow up with the agenda and attachments at least one to two days prior to the meeting. This will allow your invitees to review the documents and prepare in advance. Check on meeting logistics such as conference room reservations and room setup several days in advance of your meeting. Test your conference call number and web meeting logins, as applicable, to ensure they are working and are easy to access. As the attendees are likely working on multiple tasks, you don't want to waste anyone's time with faulty phone numbers and web links. A business meeting agenda is used to communicate important matters that will be discussed in a meeting. This document allows all participants to adequately prepare for the meeting topics. A business meeting agenda must answer certain questions: What is the topic up for discussion? Why should it be discussed? Who will be involved in the discussion? Who is in charge of certain topics? How long will the topic be discussed in the meeting? Create a new document with Meeting Agenda as the title and file name. For your convenience, you may want to format your file name in this manner: Meeting Agenda_YYYY_MM_DD. This way, when you look into your folders, any specific agenda will be easy to find. Input the date of the meeting, the venue and the names of people who are attending the meeting. This information will prove crucial, especially in tracking the progress of a certain topic, project or issue. Create a table with 5 columns, titled “Business Meeting Agenda on (date of the meeting).” Type “Topic” as the first column title. Then enter each meeting topic to be discussed. Key “Goals/Targets” as the second column title. Very briefly state the desired end result for each topic during the meeting. Type “Team” as the third column title. Note the people who will be responsible for presenting the topic or speaking on its behalf. If a topic has a team leader, be sure to note that as well. Key “Strategy” as the fourth column title. List how you plan to address the topic. Examples include “brainstorming” to generate ideas, “review” to go over a selected outcome or project, “decision” if a decision needs to be made, or “information” if general information needs to be shared. Type “Time” as the fifth column title. Indicate the number of minutes that each topic will be allotted for discussion. This is necessary to maintain a good flow of ideas in the meeting room and to provide structure to your meeting. Save your document after entering all the known information in each row. Tips A table is only a basic way of organizing the topics for discussion in a meeting. You are free to format your business meeting agenda differently, so long as the given items are all included. It is important to allocate enough time to discuss your selected topics, but not too much time, otherwise discussions tend to carry on. Ask the presenters how much time they will need to present on their topics. Make sure everyone attending the meeting receives the agenda at least a day before the proposed meeting. This will give everyone time to prepare and allow for any revisions to the agenda if necessary. An organized and developed meeting agenda ensures that all important subjects get covered at a given meeting. An outline structure helps guide the meeting's direction so that you don't jump from one topic to another, allowing business to be conducted in a more efficient manner. Start your agenda outline well ahead of the meeting so you can create several drafts and send them out to attendees before the meeting to let them know what to expect. Write down all topics you need to cover at the meeting. Start as broadly as possible. For instance, write down "Scheduling," which may contain several subtopics. Use any notes from earlier meetings, emails and information you have to ensure you have all necessary topics written down. Communicate with other meeting planners or attendees, and inquire if they have any topics needing attention. Give them a deadline for proposed topics and items so you have time to do any follow-up research or correspondence, if necessary, then insert them into the outline. Organize your topics. Look for topics that can be placed under a larger topic. If not, go through each general topic, and break that down into specific agenda items. For instance, a production meeting agenda might contain "rehearsal conflicts" and "dates to remember" under the "Scheduling" topic. Put together your main topics by order of importance. Decide what topics should go first on the outline based on how important they are, how much time you'll need to discuss them and special considerations, such as the person presenting that portion of the meeting needing to leave early, for instance. Type out your main topics in a vertical list in bold, larger font, around 14- to 16-point font. Indent or tab once and bullet each subtopic directly beneath the main topic. You can number or letter the topics and subtopics as you desire. Include any detailed points underneath each subtopic. Bullet and indent those items as well, so they sit under the subtopic, just to its right. Most software programs automatically indent, bullet and number when you press "Enter" and "Tab" at the end of a main or subtopic. Type all necessary meeting information at the top center of the document, including the title and date of the meeting, time, location, invitees or expected attendees and contact information for the meeting organizer, likely yourself. Write down the name of each topic's presenter next to the main or subtopic, if applicable. Note how much time you're giving each topic. Check with the presenter to make sure you give her enough time. Sometimes, the end of a meeting comes as a relief. You get up from your seat, file out of the conference room, and head back to your desk.Chances are, you're thinking about the meeting you just left. But are you energized because you had a role in the meeting and know what you need to do to move the agenda forward? Or are you rolling your eyes because there's no way to get the last hour of your life back?People leave meetings with very specific opinions of how they went.And if you're the person holding the meeting, your preparation will determine whether people leave with a positive or negative opinion of the meeting they just sat through.With the right planning, you can accomplish what you need to in a shorter amount of time, make people aware of their roles, and build trust in your process.But to do that, you have to follow one simple rule: If you're holding a 30-minute meeting, then you should spend at least 30 minutes preparing for it. There really aren't any exceptions to this rule. But that doesn't mean you only have to spend the exact length of the meeting in preparation. In some cases, your planning will take much longer.If you're holding a weekly review, you don't need to spend several hours planning the agenda. But if you're presenting something to the founders of the company, you may want to spend a few days preparing.For instance, when I worked at Aeropostale, I had to hold a one-hour meeting describing the impact of launching our company in an international market. I spent more than two months preparing for it. That's an extreme example, but it makes a key point. The more important the meeting, the longer you should spend preparing.You should never shortchange your preparation time, even for low-stake meetings.It's very easy for meetings to gradually balloon in size.We've actually run into this problem at ThirdLove. Sometimes, I look around and it feels like the size of our meetings has slowly crept upward until we've reached a number that just isn't efficient.That's when you have to think about who absolutely needs to be at your meeting. If several people have their laptops open, checking their email and multi-tasking, then they probably don't need to be there. They can read the follow-up notes.The point of a meeting is to educate people or drive a decision. If someone isn't necessary for accomplishing that task, don't invite them.Preparation is great. So is telling people why they've taken time out of their day to come to your meeting.You have to make people care, both in meetings and life in general. When you're standing at the head of a table and everyone's looking up at you, wondering why you've gathered them here, you have to be able to give them the "so what."I was at a really good meeting the other day that was run by a woman on our team. She told us, "We all know the customer experience of returns and exchanges is incredibly important to us. It's not perfect, and we can make it better. The goal of today's meeting is to align around the next steps to update our exchange and returns form."That was a great opening because it told the room why they were there and why they should care. The goal is to reach some sort of decision about the "so what" by the end of the meeting, even if it's just informing everyone of the next steps that need to be taken.Every meeting has an owner. This is the person who sends the invite, does the research, and sets the agenda.They've prepared, invited the right people, and kept everyone on track throughout the meeting. Afterward, they still have one more responsibility--sending a follow-up.This is all about your ability to take good notes. If you can't run the meeting and take good notes at the same time, have someone take them for you.Whatever the case, these notes should be distributed to every attendee. And at the top of the email, people should be able to see this: Here's what the meeting was about, here's what we decided, and here are the next steps.Each task should be assigned to someone and have a due date attached to it. That way, everyone knows exactly who's responsible and when these next steps are going to be taken.Adequately preparing and following through on your meeting shows people you care about their time, trust, and the topic you're covering. If you're going to treat your meeting lightly, then don't have it at all.

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