

EFFECTIVE MEETINGS

COACHING WORKSHEET

REALITY CHECK

My biggest frustration with meetings is:

THE 5 QUESTIONS

Before designing your meeting rhythm, answer these 5 questions for your business:

1. What information do we need in our meetings?

2. Why do we need that information?

3. Who needs to have access to that information?

4. How can they use that information to make an impact?

5. Who can influence the results?

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GOLDEN RULES

- All meetings start and finish on time — always
- Every meeting has a written agenda prepared in advance
- Every meeting ends with clear actions: WHO does WHAT by WHEN
- The first item on every meeting agenda is: review last actions
- I will run regular, frequent meetings rather than long, rare ones

DESIGN YOUR MEETING RHYTHM

DAILY STAND-UP (10–15 minutes)

Do I currently have this? Yes No

Day/time it will run: _____

Who attends:

Standing agenda items for my daily stand-up:

WEEKLY TACTICAL (30–60 minutes)

Do I currently have this? <input type="checkbox"/> Yes <input type="checkbox"/> No Day/time it will run: _____	Who attends: _____
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My weekly meeting agenda sections (e.g. Dashboard, Last Week, This Week):

MONTHLY, QUARTERLY & BEYOND

MONTHLY	QUARTERLY	6-MONTHLY	ANNUAL
<input type="checkbox"/> Have it <input type="checkbox"/> Need it	<input type="checkbox"/> Have it <input type="checkbox"/> Need it	<input type="checkbox"/> Have it <input type="checkbox"/> Need it	<input type="checkbox"/> Have it <input type="checkbox"/> Need it

MEETING MINUTES

Action / Who Does What	Who Is Responsible	By When	Done?