CHECKLIST 5

Running Effective Team Meetings

PURPOSE: *Plan, facilitate, close and follow up on team meetings so they are productive, engaging and end in owned actions.*

Meeting: *Name or purpose*	**Date and time:** *MM/DD/YYYY, HH:MM*	**Duration:** *Default to 30 min*	**Facilitator:** *Enter name*

WHEN TO USE

Use this to ensure your team meetings are productive and engaging. Run the first two sections before the meeting, the middle sections during it, and the last two after.

BEFORE THE MEETING

- ☐ Clear purpose/goal for this meeting
- ☐ Agenda shared 24 hours in advance
- ☐ Right people invited (no more, no fewer)
- ☐ Appropriate duration (default to 30 min, not 60)
- ☐ Any prep work communicated
- ☐ Materials shared in advance if needed
- ☐ Meeting space/technology tested

AGENDA STRUCTURE

- ☐ Opening: Quick wins and recognition (5 min)
- ☐ Updates: Critical information shared (10–15 min)
- ☐ Discussion: Topics requiring team input (20–30 min)
- ☐ Decisions: What we decided today
- ☐ Actions: Who's doing what by when
- ☐ Closing: Questions and wrap-up

FACILITATING WELL

- ☐ Start on time (respect people's schedules)
- ☐ Restate the purpose and agenda
- ☐ Explain the "why" for agenda items
- ☐ Keep discussion focused and on track
- ☐ Draw out quiet people: "Sarah, what's your take?"
- ☐ Manage dominant voices kindly
- ☐ Watch the time and adjust as needed
- ☐ Take notes or assign a note-taker

- ☐ Track action items as they come up

CREATING PSYCHOLOGICAL SAFETY

- ☐ Thank people for speaking up
- ☐ Respond to questions respectfully
- ☐ Don’t punish bad news or concerns
- ☐ Model vulnerability when appropriate
- ☐ Address side conversations kindly
- ☐ Ensure all voices can be heard
- ☐ Acknowledge good ideas from everyone

DECISION-MAKING

- ☐ Be explicit: “I’m deciding” vs “We’re deciding together”
- ☐ Give people time to think before deciding
- ☐ Summarize different perspectives
- ☐ State the decision clearly
- ☐ Explain the reasoning (start with why)
- ☐ Check for questions

DECISIONS MADE TODAY

Decision	Reasoning (the why)	Decided by

ACTION ITEMS

Owner	Action item	Due date

CLOSING WELL

- ☐ Recap decisions made
- ☐ Review action items with owners
- ☐ Set next meeting date if needed

- ☐ Thank everyone for their contributions
- ☐ End on time (or early!)

AFTER THE MEETING

- ☐ Send notes within 24 hours
- ☐ Include: decisions, action items, owners, deadlines
- ☐ Follow up on commitments you made
- ☐ Check in with anyone who seemed concerned
- ☐ Reflect: What worked? What didn't?

AFTER THE MEETING — NOTES

WARNING SIGNS OF BAD MEETINGS

If you see these signs, reset. Ask the team: "How can we make our meetings more valuable?"

- ☐ No clear purpose
- ☐ People multitasking on laptops/phones
- ☐ Same people dominate every time
- ☐ Decisions aren't actually made
- ☐ Action items have no owners
- ☐ Meetings regularly run over time
- ☐ People leave confused about next steps

> **Pro Tip:** If you see the warning signs, reset. Ask the team: "How can we make our meetings more valuable?" Then actually change the meeting based on what they tell you.