Effective Meeting Tips

1. Model the [Principles and Standards that Define Who We Are](#)

- 5 Life Lessons: Be Honest, Work Hard, Have Fun, Be Grateful, and Pay it Forward.
- 5 Operating Philosophies: Integrity, Our People, Our Customers, Growth, and Attitude. Vision: To Be the BEST, Care for, Cultivate, Delight Customers, and Grow Responsibly.

2. Invite People Who Have the Answers

- FIRST: Decide if you really NEED a meeting.
- Avoid inviting more than one person from the same department.
- Check scheduling availability for all intended participants to avoid double-booking; Use "AutoPick". Book meetings in advance whenever possible … avoid emergency meetings as much as possible.

3. End on Time to Start on Time

- Begin wrapping up meetings AT THE 5 MINUTE warning.
- Be prepared to contribute to achieving the meeting goals so the meeting runs efficiently.
- Consider using the Early Finish default setting.
- Follow the Agenda to avoid ending late.

4. No Agenda – No Reason to Meet

- Respect meeting participants by providing a purpose and agenda…in advance! Don't bog down your own meeting with a lengthy, overly detailed agenda.
- Indicate by name any individuals who will be responsible for reporting on a specific area.

5. Stay Mentally and Physically Present

- Be present and don't attend to non-meeting business…Cameras ON!
- Listen attentively to others and don't interrupt or have side conversations.
- Treat in-person and virtual meeting participants with the same respect you want from them.
- Send a qualified delegate when you are not available to attend.

6. Avoid Verbal Orders (AVO)

- Document discussion points, outcomes, and action items assigned and …
- Share with meeting invitees and any other stakeholders shortly after the meeting concludes. Use a common app for notes and actions that participants can access, like OneNote or Excel.

7. Facilitate and Initiate

- For longer meetings, get a volunteer to take the minutes and actions…you can facilitate better!
- Make sure decisions are supported by the group, otherwise they won't be acted on.
- Note pending issues and schedule follow up meetings as needed.
- Engage all participants to get everyone's input and feedback.

8. Timing is Everything…Well, Almost Everything

- Avoid scheduling meetings before 8:00am or after 5:00pm or between 12:00pm and 1:00pm, a few exceptions are ok.

9. Technology is Your Friend

- Use a meeting template to help standardize important elements of planning and running a meeting.
- Record meetings in Teams when there is a large amount of complex information or data being shared; BUT make sure attendees agree that the meeting can be recorded.