

Skillbook

Meeting Skills

Communication
Skills



Mindtools

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Skillbook

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1. Introduction

Whether it's brainstorming new ideas, gathering feedback, or introducing a new process or system, meetings are an essential part of any workplace.

When managed correctly, they are a great opportunity for people from across the business to come together and collaborate on projects. Conversely, if they're poorly run, they can become unfocused and unproductive, and waste time.

In this **Skillbook**, we'll look at what you can do to make your meetings more focused and productive. In particular, we'll provide you with:

- A step-by-step guide to running effective meetings.
- Tips on how you can add value to meetings when you're a participant.
- Help to set up guidelines that will improve meeting etiquette in your organization.

Once you've completed this Skillbook, you'll have all the tools that you need to make your meetings both engaging and productive.

2. How to Run Effective Meetings

In this chapter, we look at a four-step approach that you can use to plan and run your meetings effectively.

But, before we do this, it can be useful to think back over your experiences of meetings, both positive and negative. While it's usually easy to pinpoint why a meeting was bad – for example, there was no agenda, the discussion was poorly controlled, or it ran over time – it may not be so obvious why a meeting went well.

Action:



Think about one or more successful meetings that you've attended recently, and answer the questions below.

Describe a meeting that you have attended that went well.
What made it so successful?
What did the person leading it do to accomplish the meeting's objectives?

What did the participants do to ensure that the meeting achieved its objectives?



Action:

Now, think about the last meeting you attended that didn't go so well. Why did it fail to deliver?
And, what could you have done to improve it? Write down your answers in the boxes, below.

Describe a meeting that you have attended that did not go well.

Why did it fail?

What could have been done to improve it?

A Four-Step Approach to Running Effective Meetings

There are four key steps that can help you to run effective meetings. These are:

1. Do the prep work.
2. Have a clear objective.
3. Set up an agenda.
4. Follow a sensible process.

Step One: Do the Prep Work

Before you go ahead and start planning your meeting, ask yourself: do you really need one? Far too often we rush into booking a meeting without considering whether it's necessary. This can result in wasted time and energy.

So, before you schedule that meeting, consider the following points:

- Have you explored all possible solutions to the problem?
- Is there anything else that you can do before you involve other people?
- Do you need outside input to make progress?
- Does your progress depend on face-to-face involvement? If not, would an email or IM conversation do?

If a meeting is necessary, good organization is key, so make sure that you've covered all the main practicalities when you come to set it up. These might include booking the meeting room; setting up equipment; or preparing printouts, presentations or other written material that participants will need.

This is also a good time to think about the format that you want the meeting to take. For instance, if you want to set up short, regular meetings, you might like to **try Scrum Meetings** (also known as “stand up meetings”). Or, if the meeting includes people from different offices or locations, you may need to organize a **Virtual Meeting**.

If you need to get a larger group together, you may be better off holding a **Company Town Hall Meeting**. And, if you want something different, why not try a **Walking Meeting**? These can be great for energizing participants and boosting creativity.



Action:

Use the meeting prep checklist, below, to get everything you need organized in time for your next meeting.

Meeting Prep Checklist	
Select the right participants and send invitations.	
Decide when and where to hold the meeting.	
Book the meeting room.	
Prepare handouts and distribute to participants.	
Prepare other key material, e.g. presentation slides or diagrams/charts.	
Identify, book and test any equipment that will be required.	

Step Two: Have a Clear Objective

For a meeting to be truly effective, it must fulfill a purpose. So, before you send out those invitations, make sure that you know exactly what it is that you want to achieve, and that this is clear to everyone attending.

Your meeting's objective will vary depending on the issue that you want to resolve. For example:

- Do you want a decision?
- Do you want to generate ideas?
- Are you getting status reports?
- Are you communicating a particular point or points?
- Are you making plans and need your team's input to do this?



Action:

Think about what you need to achieve by the end of the meeting. Then, write down what your key objective(s) are in the box, below.

By the end of the meeting I want the group to achieve...
1.
2.
3.
Your Meeting's Key Objective(s):

Step Three: Set Up an Agenda

Meeting agendas are excellent tools for making sure that your meetings stay on track and on time.

Not only do they help you to set expectations up front, they also help you to organize the subjects that you want to cover into a sensible structure. This will help to get everyone “on topic” quickly, so that no time is wasted.

In general, an effective agenda will need to cover the following points:

- **Date and time** – when will the meeting take place?
- **Location** – where will the meeting take place?
- **Priorities** – what key points do you need to cover?
- **Results** – what are your main objectives?
- **Participants** – who needs to attend the meeting for it to be successful?
- **Sequence** – in what order do you want to cover the topics?
- **Timing** – how much time do you want to spend on each topic?



Action:

Use the agenda template on [page 17](#) to set out the details of your meeting. Include the date, time, place, and duration of the meeting, as well as its main purpose.

Next, write down the specific topics that you want to cover in the order that you want to address them. Allot a set time and objective for each of these topics, and specify whether a particular team member will need to lead the topic (if they have specialized knowledge of it, for instance).

Your meeting agenda will help you to identify the information that you need to prepare in advance, as well as the level of involvement you are expecting from the participants.

If it's a brainstorming session, you might like to ask participants to come prepared with some researched ideas. Or, if you are discussing the progress of a project, ask each person to give a summary of how they are getting along.

Another effective method for increasing attendees' involvement is to assign particular topics to different people. On the agenda, indicate who is leading the discussion for each item. This tactic will likely increase "buy in" and engagement from participants.



Tip 1:

You may find, in the course of drawing up your agenda, that certain people won't need to contribute as much as others. Ask yourself whether these people really need to be there, or whether they could get everything they need from the meeting's minutes.

Consider removing them from the list of participants. This will ensure that only the right people are attending the meeting, and avoids wasting their time.



Tip 2:

Use your agenda as a time guide to make sure that all topics are given a fair amount of time to be discussed. If you find that your meeting starts to run behind time, use the following tactics to get it back on track:

- Hurry the discussion.
- Push for a decision.
- Defer making a decision until another time.
- Assign the decision to another person or team to follow up after the meeting.

Step Four: Follow a Sensible Process

In order to get to the desired end result, your meeting will need to follow a logical order. So, be sure to consider the following points when you plan your next meeting:

Before the Meeting

Once you've prepared your agenda, circulate it to your participants to get their input on the objectives and the key points that you want to discuss.

There might be something important that another participant wants to talk about, or something that you have forgotten to add. Or, there may be some points that you've added that have already been settled and that you can remove.

During the Meeting

As meeting chair, one of your key responsibilities will be to encourage engagement from all participants (including those that perhaps aren't as confident as others).

There are a number of different techniques you can use to do this:

1. Get everyone's input.

If someone is dominating the conversation, use the following tactics to encourage other team members to speak up:

- Ask someone else to comment on what the dominant participant has said. This takes the discussion away from that person. For example: "Jo, what do you think about the points that Raj has been making?"
- Ask the dominant participant to bring their remarks to a conclusion. An example is: "Raj, you've raised a number of interesting points. Would you please summarize them for us?"
- Ask a quieter member of the group for their thoughts directly. For example: "Alana, you haven't spoken yet. What do you think?" (Remember to only do this if you think they are comfortable answering in front of the group.)

2. Summarize each agenda item when you've finished discussing it.

Doing this will ensure that everyone is clear about what the final decision is, and how or why it was made.

Once you've provided an overview of the item, ask people to confirm that they are happy with it and that it's fair. And remember to make notes on any final decisions, which you can all refer back to later.

3. Take notes.

Assign a team member to take notes throughout the meeting. Choose someone who summarizes and writes clearly, so that the information is easy for everyone to read and understand.

The notes that you take will depend on the type of meeting that you are attending. For example, if you need to draw up some briefing notes for people who have not attended the meeting, they should give a detailed explanation of the discussion and decisions that were taken.

But, if all that's needed is a list of actions that have been assigned to people, then your notes will likely be much shorter. Some meetings, particularly those that convene to solve one-off problems, may not need any notes at all.

4. Watch body language.

You want team members to stay focused during a meeting, so pay attention to their body language!

If they're squirming in their seats, or gazing into space, then perhaps you need to take a short break. Or, if someone is looking down a lot or has closed body language (folded arms), it could be a sign that they are unhappy with the discussion. If this is the case, ask them to share any concerns that they have or offer a new idea, if they have one.

5. Summarize the key points covered at the end.

At the close of the meeting, summarize the next steps that you, as a group, have decided to take. This will ensure that everyone is clear on the tasks that have been assigned to them and the actions that they need to take next.

Inform everyone that you will be sending out the meeting notes promptly. This will provide people with something to refer back to after the meeting is finished.

After the Meeting

Once your meeting is finished, take some time to debrief. Ask participants what they felt went well and what didn't. It can also be useful to go back to the original objective that you set for your meeting and compare the final result with your initial expectations. This will help you to fine-tune your meeting format and style for next time.

Finally, prepare and send out the notes that were taken during the meeting. This is an essential part of any meeting, as it ensures that any actions that were agreed, or tasks that were assigned to people, get done.

3. Adding Value to Meetings

So far, we've talked about what's involved in setting up and chairing a meeting, but it's also important to think about how you can add value to meetings when you're a participant.

When you seek to add value to your meetings – for instance, by contributing relevant comments, collaborating with colleagues, and adding constructive feedback and suggestions – you'll be seen as a “driver” rather than a “passenger.”

In this chapter, we'll look at seven ways you can add value to the meetings that you attend:

1. Be selective.
2. Prepare in advance.
3. Identify your role.
4. Play to your strengths.
5. Help others to be heard.
6. Use positive body language.
7. Take effective notes.

1. Be Selective

Before you hit the “accept invitation” button, think about whether you really need to attend.

If you are invited to a meeting but you genuinely don't feel that you have the right expertise or knowledge to contribute, then ask the facilitator what their reasons are for inviting you.

Perhaps you don't have enough time to attend the meeting. If so, ask if you could attend only the part of the meeting that is relevant to you, or whether it's possible to send your thoughts via email.

2. Prepare in Advance

Be sure to read any agenda or prep material that's been distributed before the meeting starts. And, make some notes or questions on each of the agenda items that will be covered.

If you've been assigned to lead part of the meeting, make sure that you have all of the information you need to hand – for instance, data, charts, or other facts and figures. Think about any questions that people might ask you and prepare your answers ahead of time.



Action:

Prepare for a meeting that you are due to attend. In the table, below, write down the main agenda items that will be discussed. Then, next to each item, jot down any comments or questions that you want to add.

If there's any further information or relevant material that you think will add value to the discussion, list it in the column on the far right (and be sure to bring it along with you to the meeting).

Agenda Item	Comments and Questions	Relevant Additional Material
1.		
2.		
3.		
4.		
5.		

3. Identify Your Role

Think about why you've been invited to the meeting. Are you there to provide feedback or constructive criticism? To contribute ideas? Or, do you have specialized knowledge of a topic? If you're unsure, ask the meeting's facilitator, in advance, about what they expect from you.

4. Play to Your Strengths

Contribute to the meeting in ways that play to your strengths. For example, if you're a concise writer, but not a big talker, you might like to provide an analysis of the subject beforehand, assume responsibility for note-taking during the meeting, or share your reflections in an email afterward.

If you're more confident and outgoing, you'll likely have no problem speaking up. But remember, only contribute when you have something **truly valuable** to say – otherwise you risk wasting time and energy. And really listen to other people, so that you can offer carefully considered responses.

5. Help Others to Be Heard

Even if you aren't facilitating the meeting, you can still play a part in encouraging others to participate.

Meetings should be about collaboration – allowing people to combine their talents, so that the group's knowledge is greater than that of the individuals. They are also about sharing and understanding different perspectives and viewpoints.

So, if you notice that someone is being interrupted or ignored, you could say something like, "Excuse me, Alex, what were you going to say?"

Alternatively, you could invite someone to contribute with a prompt such as, "Jasmine, you've worked on this kind of project before. What did you do to solve the issue?"

6. Use Positive Body Language

Positive body language is a great way to show others that you are engaged and listening to what they have to say. Sit up straight, smile or nod at the person who's speaking, and unfold your arms to show that you are open to ideas and suggestions.

This will make the speaker feel supported, and will help to create a positive, engaging atmosphere.

Conversely, sitting with arms folded, head down, or fiddling with your cell phone or laptop makes you appear disengaged, and could lower the energy in the room.

7. Take Effective Notes

Although you may have a designated note taker, you might find it useful to jot down your own thoughts during the meeting, too. These should cover the key points that you discuss during the meeting.

Be sure to note down any important information that you'll need to refer back to later – for instance, tasks or actions that have been assigned to you, project deadlines, or key decisions.

If the meeting doesn't have an official note taker, offer to share your notes or a summary of the meeting with the other participants, or with people who weren't able to attend.



Tip:

The Cornell System is a useful note-taking tool that can help you to record and recall information that you discuss during meetings.

4. Guidelines for Good Meeting Etiquette



One of the best things that you can do to improve the effectiveness of meetings across your organization is to draw up some “ground rules” or guidelines that govern people’s behavior in relation to them.

For instance, you could consider introducing rules such as:

- Always start meetings on time.
- Come prepared.
- Stick to the agenda.
- Only use meeting rooms that have been booked ahead of time.
- Contribute and listen to people fairly and without judgment.
- Record outcomes and actions, and follow up.



Action:

Either individually or with your team, think up five or six key guidelines that could help to improve the way you run meetings in your organization. Write them down in the table on the following page.

If you think these guidelines might be useful to other people in your company, consider distributing them to other department heads or HR. You may even like to draw up a formal meetings charter, which includes your organization’s key guidelines, and display it in your meeting rooms.

Meeting Guidelines
1.
2.
3.
4.
5.
6.

5. Key Points

To run meetings effectively you need to make sure that they stay on track and on time. You can do this by following these four key steps:

1. Do the prep work.
2. Have a clear objective.
3. Set up an agenda.
4. Follow a sensible process.

You can also help to add value to the meetings you attend as a participant. For instance, by reviewing the agenda and preparing comments and questions in advance, helping others to speak up, using positive body language, and taking careful notes.

This will improve your level of engagement in the meetings that you attend, and will help to keep you focused on the actions or tasks that were delegated to you during the meeting.

Finally, consider drawing up some company-wide meeting guidelines to make sure that meetings are run effectively and avoid wasting time throughout your organization.

Meeting Agenda Template

Agenda			
Date:	Time:	Duration:	Location:
Meeting Purpose:			

Topic/Item	Time Allocated (Minutes)	Topic Leader	Objective
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			