

## Transforming Meetings: Small Shifts, Big Impact

While essential to business, meetings are often poorly executed and costly. Too often, we endure ineffective meetings that waste time and money, stifle creativity, and erode team spirit.

Small, strategic microshifts can transform bad meetings into powerful opportunities for alignment, collaboration, and execution. By implementing these subtle yet impactful changes, you can create a culture of efficiency and engagement, where meetings drive momentum rather than diminish it.

### Disengaged & Distracted



### Focused & Innovative



## Uplevel your meetings to save money and morale

It starts with identifying and clarifying when a meeting is a meeting, or when it is one of the following. When you define it as it truly is you create a better container of trust for your team and you make it much easier on yourself in the process.

### Updates vs Meetings

We have attended gatherings that are filled with feels-good, rah-rah information meant to show progress. Updates are needed, but they are not meetings. Updates lower risk and fail to tap the wisdom of the room (individual vs. collective). Doing these is disrespectful and an unintentional breach of trust. Stop it.

### Presentations vs. Discussions

If you want to give a presentation, great: call it that. If you want to harness the full talent of who is in the room and what matters, be prepared. Send an agenda, provide updates in the prep work, and engage participants in a conversation. Ask real questions, create conversation, and be open to what is being said.

### Raw-Raw or the “Minnesota Nice”

We have all attended “kind or nice” meetings, only to walk out the door and hear people muttering under their breath. While “collegial,” these meetings not only waste your time, they are secondary breaches of trust. Do not host meetings unless stakeholders are prepared to show up, engage, and have real conversations.

**No meeting is often better than a bad meeting.  
Having an illusory meeting is worse than no meeting at all.  
Build trust by engaging others in the real agenda.**

## Reflect on a GREAT Meeting

### What was the...



**Energy?** Energizing, focused, engaged, and excited, ready for the next steps.



**Engagement?** Rolling up sleeves, working hard, and opening up to new opportunities.



**Possibilities?** What felt achievable when everyone was engaged and focused?

## Mindset Shifts to Have Better Meetings

The key to creating great meetings lies in preparation long before they are scheduled. Answering questions such as **What, Why, How, Who, and So What** is essential.

To position meetings for success invest time to clarify objectives, outcomes, decisions, data needed, and more.

### What you Permit you Promote

If you attend without a clear agenda (purpose, outcomes, prep materials to review), you become part of the problem. Yes, it takes more time for the conveners to prepare this. HOWEVER, collectively, it saves more time than it consumes. Show respect for your colleagues; do the work.

### Manage Time

Effective meetings hinge on efficient time management. This includes starting on time, following the agenda, and recalibrating on time and priorities as needed. The goal is to guide the conversation toward addressing important issues and ensuring that clear action steps are captured.

### Engage Right Stakeholders

Effective meetings hinge on having the appropriate people present. Too little attention is spent on having the right people involved, focused on the right things. Meetings either default to being too inclusive or lack defined outcomes and nothing gets done. Conversely, when too much emphasis is placed on time constraints, they may fail to engage key stakeholders.

**Too many meetings can be a significant burden, leaving little time to actually accomplish work as each meeting adds to the workload. Often, these meetings lack preparation, with no agenda, insufficient prep time, and little thought given to who should attend.**



## Questions to Ask Before the Meeting

### Outcomes

- What outcomes are you driving towards?
- Why is this meeting important?
- What needs to happen as a result of this meeting?
- How will you move into action?

### Participants

- Who needs to be involved vs. informed about this meeting?
- Who is participating, and how will you manage participation (both lack of and over-participation)?

### Format

- What is the right format?
  - Synchronous (interaction/discussion)
  - Asynchronous (updates/report outs)

### Preparation

- What information is critical to prepare for this meeting?
- What is essential for the agenda?



**Lead your team consciously through staying prepared and attentive to the energy of the room.**



# Questions for Creating Effective Meetings; Processes and Cultures

## Executive Support

- To be successful, what executive support is critical?
- How are you managing up?

## Meeting Culture

- What is your meeting culture?
- How are expectations communicated?
- How do you build respect, rapport, and trust?

## Logistics

- How will you manage multi-tasking?
- How will you manage disconnects (e.g., cameras off, side conversations)?
- How do you balance creating connections while being forward-focused?

## Managing Dynamics

- How will you manage over-talkers?
- Is there an expectation of "first before second" (everyone gets to talk once before anyone speaks again)?
- How will you address absence or people who are not prepared?

## Real-Time Calibration

- Things happen. How do you calibrate in real-time?
- What tools will help you reset or refocus mid-meeting?

## Continuous Improvement

- How do you promote the value of CANI (Constant and Never Ending Improvement)?
  - What worked well?
  - What could have worked better?
  - What did you learn?
- How can you prepare forward:
  - Right people? Right process? Right structure?



## Planning Forward: The Meeting “Must-have” Checklist

### Ideas you can implement now

#### Meeting Preparation:

- Define the purpose of the meeting (presentation or collaboration).
- Clarify what are successful outcomes.
- Develop a clear agenda with specific topics to be covered.
- Distribute the agenda and any necessary prep materials in advance.
- Ensure meeting organizers are well-prepared.

#### During the Meeting:

- Begin with a brief overview of the meeting’s purpose and desired outcomes.
- Foster an environment of genuine discussion and involvement.
- Encourage active participation and dialogue from all attendees.
- Pose meaningful questions to stimulate discussion.
- Remain open to diverse perspectives and ideas.
- Avoid “feel-good, rah-rah” updates that lack depth.
- Ensure discussions address real issues and do not avoid tough conversations.

#### Trust and Respect:

- Show respect for colleagues by being well-prepared and engaged.
- Foster trust by involving others in genuine discussions about the agenda.
- Address any issues or concerns openly and honestly.
- Ensure the meeting respects everyone’s time and contributions.

#### Post-Meeting:

- Summarize key points, decisions, and action items.
- Distribute meeting minutes promptly to all participants.
- Follow up on action items and hold individuals accountable.

#### Avoid:

- Attending or organizing meetings that lack substance.
- Allowing meetings to become merely “kind” and “nice” without addressing real issues.
- Failing to respect colleagues’ time by coming unprepared.
- Holding meetings without clear objectives or outcomes.



## Ideas into Action



### **AWARENESS:**

- Audit your meetings: Are there agendas? Is time managed? What are the outcomes?
- What are the direct and indirect costs?
- Who is effective at meetings and why?

### **ACTIVATION:**

- Set clear outcomes- no agenda/no agenda.
- Clearly define the purpose: presentation or collaboration.

### **AGILITY BUILDING:**

- Practice having better meetings.
- Build in regular reflection.

### **ACCOUNTABILITY:**

- Hold team members accountable.
- What helps you to be focused, on time, have a plan?
- Ask for feedback about your meetings

### **INTEGRATE/ACCELERATE:**

- Share wins openly to apply to other situations.
- Distill success strategies.

**Identify microshifts that matter to gain momentum.  
Build a productive culture, engage colleagues and save time.  
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