

Step-by-step guide to planning and running a meeting

1. Define the purpose of the meeting

Every meeting should have a clearly defined objective or purpose. The best way to consider this is to ask: “At the end of the meeting, I want to know/achieve...”

2. Decide on the type of meeting, date and time, and invite participants

First, decide on the best format for the meeting, e.g. teleconference or face-to-face. This will usually depend on what you want to achieve.

Before setting the date and time for the meeting, get an idea of what's best for the participants. Providing some suggested dates/times is likely to get a better response than asking for suggestions. Once decided, send out a formal invitation with the date, time, telephone/dial-in number or venue, together with the purpose of the meeting.

3. Develop an agenda for the meeting

Send an agenda to all the participants 2–3 days in advance of the meeting. This document is crucial to the success of the meeting as it clarifies the objectives, lists each item and how long should be spent on each, and provides direction during the meeting.

Put the most important issues at the top of the agenda so that these are covered first, and remember to add breaks into long meetings, providing refreshments if necessary.

4. Run the meeting

Assign a person to be the chair. This person is responsible for ensuring the meeting runs to time, that all the items on the agenda are considered, and that everyone has the opportunity to share their opinion. He/she may also greet the participants and thank everyone at the end.

There should also be someone responsible for taking the meeting's minutes. These should include the next steps or 'actions', the person who will be responsible for each of them and any set deadlines. The minutes should also note any new issues that are raised, but not resolved, to cover in the next meeting.

5. Write the minutes and follow up on agreed actions and responsibilities

Minutes should be written and sent to all the participants, within 1–3 days of the meeting. Monitor assigned tasks/actions to ensure that they are being done.