

FACILITATION

FIRST

Meetings - Who to Invite?

It's not uncommon for interpersonal or political considerations to result in meeting bloat, where too many people end up invited to a meeting that takes too long and doesn't achieve all its objectives. So, how do you decide who really needs to attend?

Choose attendees once you've clarified the purpose and outcomes for the meeting and have developed specific activities on the agenda to reach those outcomes. The only people who need to be at your meeting should be those that match one or more of these criteria:

1. They have subject matter expertise that everyone else needs that can't be communicated outside of a face-to-face meeting
2. They need the subject matter expertise that will be present at the meeting
3. They are decision makers responsible for agenda items

Note: Those tasked with execution can be informed at a stand-up meeting (15 minutes) or for gathering any required feedback before moving on to implementation.

Once you have narrowed down your list of who to invite, let each attendee know what their role will be at the meeting. If it's a subject matter expert, give them tips or a template to follow to present the information that everyone needs in the minimal amount of time. If they are there to gain vital information, let them know in the agenda what questions will be answered at the meeting. Then these people can decide if they need to be there or not. If they are decision makers, let them know in advance when a decision will be made, and determine what pre-work may be required to aid in the decision-making.

Remember, **not everyone has to stay for the whole meeting**. If an attendee can only contribute to one agenda item, they can sit near the exit and leave after making that contribution.

Meeting Invitations – The Power of the “Decline” or “Tentative” Response

If you receive a calendar invitation and it's unclear if you meet the criteria above, you have options:

1. Send a tentative response, asking how you can contribute to the meeting outcomes (is your attendance mandatory, or was the invite out of courtesy or to keep you in the loop?)
2. Send a tentative response, asking for an agenda if it wasn't sent with the invite
3. Send a decline if the meeting outcomes are clearly outside your area of expertise or involvement

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Hold a Face-to-Face Meeting If...

1. It's a team's first meeting (new project or team)
2. One of the three C's holds true for your topic: Confidential, Contentious, Controversial
3. Purpose requires more than 90 minutes (virtual meetings lose steam, even with breaks, if they're longer)
4. The agenda is strategic (e.g. setting vision/purpose, objectives, etc.)
5. The meeting is essential to creating alignment amongst members
6. The outcomes require consensus building Consensus building creates and builds commitment to outcomes, but can take longer and be less robust in virtual meetings
7. The meeting is geared to build and/or improve relationships among members
8. There is a shared interest in the outcome; successfully addresses "what's in it for me?" (e.g. to make a decision, solve a problem, enhance communications, etc.) If not, ask yourself if the topic justifies a meeting (remote or F-2-F) at all? For example, does a status update warrant a meeting?

Note: If you decide to go ahead with a F-2-F meeting, ensure there will be enough people (i.e. quorum) for the discussion. Require RSVPs so you know in advance if quorum will be reached.

Hold a Virtual Meeting If...

1. The full team is located in different locations
2. There is no possibility for meeting in-person
3. The meeting is going to be quick (≤ 30 minutes) like a scrum or check-in meeting

Hold a Hybrid Meeting If...

1. Most of the team is located in different locations, however a few members are located in one location/room