

7 Steps of Meeting Planning

A Meeting Preparation Framework

SITUATION	A general statement of what is going on currently and what people hope will be improved or changed as a result of the meeting.
PEOPLE	A description of those people who are slated to come into the meeting, their relationship to others at the meeting, and their roles vis-à-vis the issues on the agenda. When thinking of “people,” think about who would need to be there to provide key information or to advance a decision. Note here anyone whose presence at the meeting could derail, limit, or particularly enhance honesty or progress. Who will feel excluded if not invited? Who will feel they don’t belong?
LOCATION	A definition of physical space or of “virtual” meeting space (telephone, internet) to be used. If the location is known, name it early on because it should influence other blocks of the framework such as the agenda items and possible achievements. The details of a virtual meeting arrangement can also be specified (e.g. conference call numbers, websites for chats or online virtual meeting space).
AGENDA	A carefully sequenced list of issues or information to be addressed during the meeting. It either drives or is driven by, what you want people to achieve at the meeting. The agenda demands that we consider what background or information ought to be shared prior to the actual meeting.
ACHIEVEMENTS	A specific list of what would be accomplished in the meeting – in other words, what the participants will have accomplished together by the end of the meeting. The specific achievements of the meeting are grounded in the situation and in the people involved. What needs to get done by the end of the meeting?
TIME	Meetings are often held under pressure – due to the limited time to prepare, to hold the meeting, or to accomplish the “marching orders” from the meeting. If the time is set and not negotiable, name it early on. Recognize the reality of what can really be achieved within the timeframe you have. Try to do less to achieve more. If the timeframe is flexible, realistically name the time needed to achieve what is laid out and consult with members well beforehand to see if this is reasonable. Use of time is key in determining a successful meeting.
PROCESS	Once the other steps are defined (including naming the person or people who will run/ facilitate the meeting), you are ready to describe the process. Process includes how dialogue will be generated, information will be presented, and decisions will be made. It guides facilitation of the meeting including the tasks or actions needed to attain the desired achievements within the time frame.

These steps influence each other in such a way that when you define them all, you define each one more clearly.