

## STRATEGIES FOR EFFECTIVE MEETING MANAGEMENT Meeting Follow-Up

A review of the research on the number of hours a week spent in meetings for the average business person ranges from 3 hours to 25% of the work week. My experience as a professional parliamentarian indicates that whether it is the local city council meeting, school board meeting, or board meeting of a nonprofit organization, the number one complaint I hear is that the meetings are too long.

All of this evidence indicates that every one of us could use some assistance in meeting management. I would like to share a series of articles that cover three strategies for effective meeting management: effective chairing of the meeting, facilitating discussion, and meeting follow-up. The article on the effective chairing of the meeting can be [found on my website by clicking here](#). The second article on facilitating discussion can be found on my website by clicking [here](#). This article will cover meeting follow-up and will examine agenda preparation, templates, an action spreadsheet, and meeting minutes.

If you begin preparing for the next meeting about a week before that meeting, you have started planning too late. I encourage you to start your next meeting preparation during and immediately after the current meeting.

Preparing for the next meeting during the current meeting is as simple as writing notes on the agenda during the meeting. Everyone needs to work out their own shorthand, but what works for me is to use double asterisks (\*\*). If an item is actually postponed to the next meeting, on the agenda I write the word postponed and put double asterisks next to it. If, during the discussion of an item, it sounds like this issue may need to come back on the agenda at the next meeting, I put double asterisks and a question mark next to it (\*\*?). That tells me to review this as a possible agenda item for the next meeting.

Within 12 to 24 hours of the close of the meeting, begin preparing for the next meeting. Pull up the agenda template (which I will discuss later in this article) and first enter anything that was captured on the agenda from the last meeting. Then review the meeting minutes from the previous meeting and use them as guidance for filling in the agenda for the next meeting.

I stress that this agenda preparation should be done within a short period after the adjournment of the previous meeting because it takes far less time and memory to do it at that time than it does to do it weeks later. If you wait for weeks, you will waste valuable time trying to remember what happened.

Another great aid to meeting follow-up is to have a template for the agenda, the minutes, and the motions. The advantage of a template over pulling up the last agenda, for example, is that the template will be more complete. The template would include all of the officers and the standing committees that can give reports, not just those that gave a report at the last meeting. You can then just take off the names of the officers or standing committees that do not have a report for this specific meeting. When you use a template, you are also less likely to overlook a change from the previous agenda that is not relevant in this agenda. I recommend highlighting the areas of the template that need to be updated for each new edition.

Just as it is easier to begin the agenda preparation with an agenda template, it is also easier to begin writing the meeting minutes by using a minutes template. I cover a lot of information about what should and shouldn't be in the meeting minutes in another article that you can get to by [clicking here](#) [Dave please add link to Meeting Minutes article]

In a previous article in this series, the one that is titled: *Strategies for Effective Meeting Management – Effective Chairing of the Meeting*, you will find information on a table that includes possible wording for all action agenda items that can also be used as a template.

A sample template for the agenda can be found on my website by [clicking here](#) [Dave Help!]. A sample template for minutes can be found by [clicking here](#). You will also find a sample meeting agenda, a sample meeting script, and sample meeting minutes at the end of the article on my website that is titled: *Agenda and Script Lead to Better Meeting Minutes*.

Meeting follow-up should also include a method to keep track of action items. Frequently organizations will come up with great action items in their meetings but never act on those items because they are later forgotten. A spreadsheet of action items can help keep track of who has done what and when certain things can be expected.

Understand that this spreadsheet is not a one-time document; instead it is a

“living” document that is updated on a regular basis. If you exercise discipline and keep it updated, it is amazing how many questions can be answered quickly and accurately by referring to this spreadsheet.

In preparing such a spreadsheet one should consider the following column headings:

- ✓ Meeting date of action taken
- ✓ Heading of the action in the meeting minutes (makes it much easier to go back to the minutes and find it quickly)
- ✓ Description of action to be taken
- ✓ Name of person or committee responsible for taking the action
- ✓ When is the action due
- ✓ To whom should the action or report be given
- ✓ If this item should be on a future agenda, which meeting agenda
- ✓ Additional information
- ✓ Current status
- ✓ Date completed

Obviously this spreadsheet should be customized to fit the needs of the user. But, it must be updated and reviewed any time you are preparing an agenda to ensure things are not left off the agenda that should come before the group at this time.

There is one additional important meeting follow-up that needs to be addressed: complete the meeting minutes while they are still fresh. The sooner the minutes are completed after the meeting, the less time they will take! One of the greatest problems with meeting minutes is that people do not understand what minutes should include. Secretaries write minutes as if they are trying to include every word said. That alone may explain why they take so long to complete.

Minutes are a record of what was *done* at the meeting, not what was *said* at the meeting. It is as simple as that! They should record the actions taken but not who said what. They are a very important document because they are the official record of what was done at the meeting.

The use of skeletal minutes can help get the minutes completed in a short time after the meeting. After the agenda is prepared and before the meeting, pull up a minutes' template and begin preparing the minutes using the agenda. Use the headings from the agenda for the headings in the minutes. If you use the form to capture the suggested wording of the motions that will probably come up at the

meeting, use that tool as well. Leave lots of spaces when designing these skeletal minutes. When it is time to go to the meeting, either print out the skeletal minutes and take them with you to the meeting, or take your laptop with the skeletal minutes on the laptop. During the meeting, fill in the details. It is much easier to do so in the meeting because you have all the headings, even the wording of some of the motions, and blank spaces to write or key in the specifics needed.

If meeting follow-up is done right after the conclusion of the meeting instead of right before the next meeting, you will be amazed at the amount of time saved as well as the accuracy of the next agenda and the meeting minutes.