The Ultimate Guide to Make Any Meeting the Best Ever

✦ Boardable

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Introduction

We've all been stuck in a bad meeting at some point. You arrive on time just for the meeting to start five minutes late. There isn't even a rough outline of an agenda that says what all needs to get done. Not to mention, no one's entirely sure who's meant to run the meeting. Then, it drags past the designated end time, and nothing's been decided. The meeting adjourns, and everyone exits silently, resenting the lost hour that could've been spent on one of their many other projects.

Understanding how to maximize efficiency is one of the most vital skills an employee should have. Yet, unproductive meetings waste an estimated $37 billion every year.

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When it comes to managing the day-to-day operations of any organization — be it corporate or mission-driven — every board, executive, and staff meeting requires efficient organization. After all, mission-driven organizations and companies both have to maximize every second and dollar to keep up with competitors in today's fast-paced environment.

People come into meetings with high hopes of collaborating on innovative approaches to their organization's challenges and driving its mission forward. Then afterward, many ideas aren't followed up on and fall by the wayside. All their discussions and brainstorming go to waste. If this sounds all too familiar, it's time to put a stop to unproductivity!

In this guide, we'll outline several actionable tips and strategies for elevating any meeting to its fullest potential. By the time you finish, you'll be a pro on running engaging, informative meetings, so you can say goodbye to inefficiency for good!

How To Make Every Meeting Productive

Our 2019 Board Engagement Survey of more than 600 board members, chairs, and executive directors found that the typical board meeting is at least two hours long, meaning they regularly invest that much time into discussing critical matters that pertain to your organization.

For other types of meetings, such as staff training or internal information sharing, the time investment might not be quite as long. **But the bottom line still remains: meetings must be productive in order to be worthwhile.**

As a specialist in board governance, engagement, conflict resolution, and strategic planning, Kim Donahue is an industry leader with more than 20 years of advising experience at the United Way of Central Indiana. Donahue joined a Boardable webinar to talk about how to plan and execute the perfect meeting. The length and frequency of meetings can vary.

> Younger organizations may need to meet more frequently in order to coordinate operations," Donahue said. "As [an organization] becomes more established, it can adopt a wider cadence of meetings that is more appropriate for its needs.

However, the success of every single meeting comes down to **preparation**.

Meetings will naturally be more productive if all participants understand what goals they're attempting to accomplish and have done their homework beforehand. Regardless of if you're going into your annual board meeting or a weekly staff meeting, here are some tips that'll help any meeting organizer prepare:

Create and share documents beforehand.

While your group may be meeting to discuss the results of a study or report, you don't have to drone through each point with the entire team. That's disengaging and wastes everyone's time together. Instead, send out the content prior to the meeting to give everyone the opportunity to review it on their own time. Then, use the time together to discuss the overall significance of the findings, answer any questions, and collaborate on the appropriate next steps as a result.

PRO TIP

Boardable's Document Center makes it easy to securely store and share documents.

Make sure everyone understands the deliverables and the tasks at hand.

For board meetings, it's up to officers to ensure everyone pulls their weight. This means holding everyone accountable for their duties and goals as board members — even outside of the boardroom. Other internal teams like staff members and executives can take note of this strategy. Setting clear deadlines and following up with those responsible for deliverables helps sustain productivity between meetings. That way, people won't arrive at the next meeting confused about who was responsible for reaching out to potential event sponsors or following up with stakeholders about a big project they funded, delaying progress for everyone.

PRO TIP   **Boardable's Task Manager can help keep everyone on the same page and help you delegate responsibilities accordingly.**

Task	Due Date	Task List / Meeting
☐ Create February agenda and training worksheets 👤 Ieshia Hill	FEB 10	Volunteer Trainin...
☐ Make personal commitment 👥 1/12 completed	MAR 21	Marketing Com...
☐ Update list of past donors 👥 1/9 completed	APR 18	April Board Meet...

When you provide information to a group prior to a meeting, you should break it down into essential bullet points. Then, you can use your valuable meeting time to answer questions, collaborate, and discuss concerns in more detail.

As Donahue said, "In the world of board meetings, the time spent with the larger group shouldn't just be a recap of the smaller committees' meetings. Instead, spend your time on making bigger decisions based on synthesized information and data."

Key Takeaway:

Have a plan in place to keep each meeting highly focused on key objectives. Encourage attendees to adequately prepare by sending out documents and ensuring every task is completed ahead of time.

How To Build an Actionable Agenda

An important part of meeting preparation is to build the agenda thoughtfully. Regardless of industry or meeting type, having a concise agenda ensures participants have clear expectations of what they're trying to accomplish during a meeting. In turn, this gives them an idea of what they need to prepare in advance.
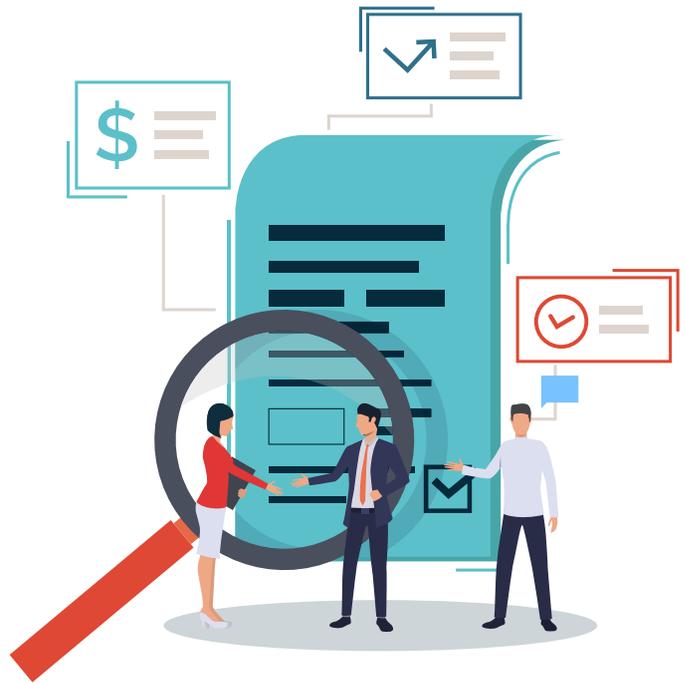
> Agendas should be built with people's time in mind," Donahue said. "A good rule of thumb is that if attendance is dwindling at your board meetings, it's probably your agenda's fault.

This reigns true for any type of meeting. If you notice that attendees are doodling on their notes or zoning out altogether, that's probably a sign that engagement is lapsing due to poor meeting structure.

The good news is that creating a structured agenda that hits all key points is actually pretty easy. Here are some strategic ideas to keep in mind while building an actionable roadmap for your next meeting:

01. **Flip the agenda so the most pressing items are at the top.**

It's no surprise that many people tend to tune out toward the end of meetings, especially once they pass the hour mark! Saving your most critical topics for the end will result in poor participation and may make your team fall short of the meeting's objectives. Flip your agenda to hit on these hot button items first when everyone's minds are fresh, and then circle back to less-pressing issues at the end.

02. **Build your agenda specifically to maximize input from your group.**

Include action-oriented items, like polls or discussion topics, to give everyone a chance to speak up. You could also include success stories at board meetings to connect members' work to impact, or you could include training elements in your employee meetings to ensure they're approaching every task in the most productive manner.
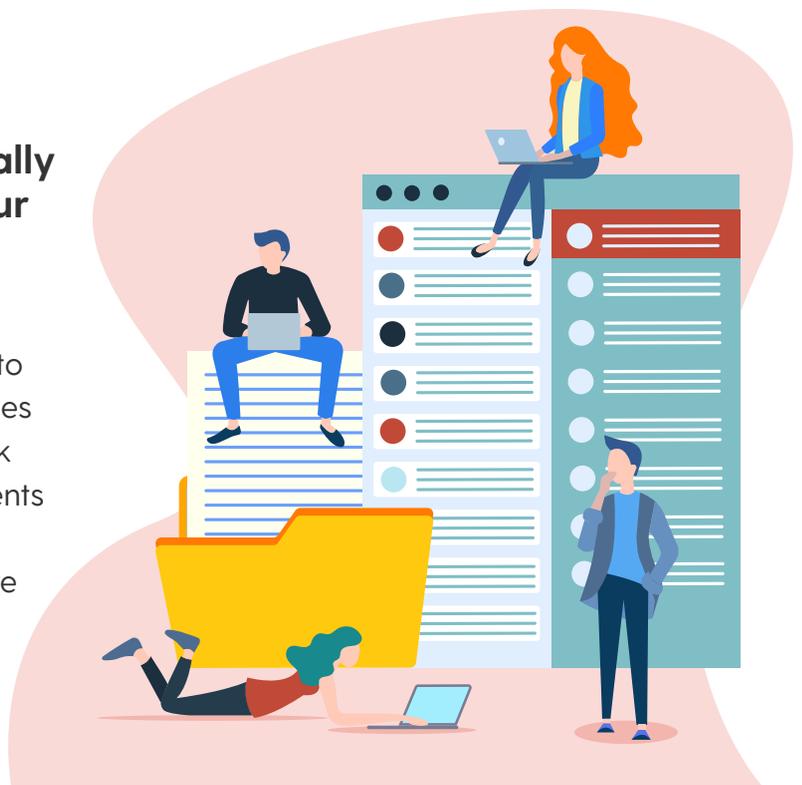
03. Include time limits on each agenda item.

Time limits help meeting leaders manage the meeting, keep things moving forward, and set expectations for how much attention should be devoted to each topic. Attendees will easily identify which high-priority items they need to focus the most time and energy on discussing. Plus, knowing how much time is designated for each item makes it much easier to wrap up discussions.

04. Use a consent agenda.

These agendas group routine, procedural, informational, and any non-controversial topics together so that, instead of having to run through each item individually, groups can either approve or deny all of them as a group. Things like approval of past meeting minutes, final proposals that have been previously discussed, and committee reports fall under this umbrella. Ask for questions, and then approve these reports en masse to save everyone's energy for in-depth discussions and brainstorming sessions.
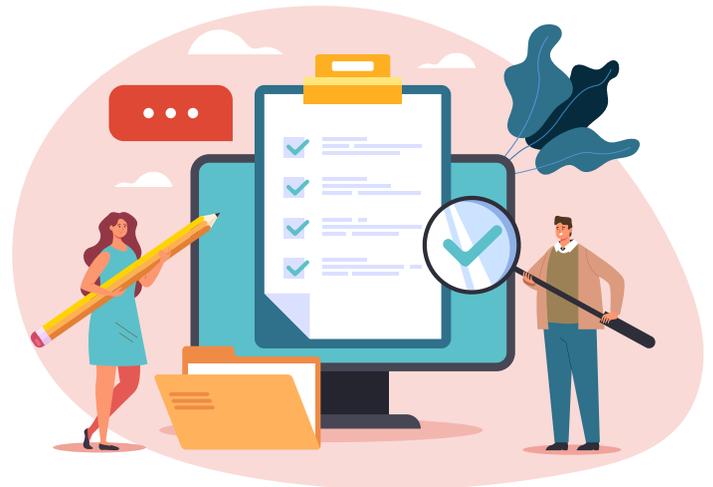
Be sure that everything you include in your agenda is worth discussing. If there's not a clear purpose for including it, it's likely best to not touch on it at all. Knowing what to include and how to structure each item effectively will naturally make your agendas (and therefore your meetings) as productive as possible.

PRO TIP:

Boardable's Agenda Builder makes it incredibly easy to build and share actionable agendas with your teams. Add descriptive items, assign them to individual attendees to cover, and allot a specific amount of time to each. Share your agenda as a dynamic PDF with your team, giving everyone plenty of time to prepare. Then, you can record your minutes directly onto your agenda and assign follow-up items so your meetings stay highly productive.

Third Quarter Board Meeting Agenda

📅 Fri July 10th, 2020

🕐 5:45pm - 8:45pm   EDT

📍 https://us02web.zoom.us/j/1234567890?

1. **Welcome**
   a. **Introduction Of New Members**
      i. **Molly Anderson Profile**   — MOLLY ANDERSON

2. **Consent Agenda**   — 5 mns
   a. **Approval**
   b. **Approval of Q2 Minutes**   — GRACE BAKER
      📄 January Minutes

3. **Financials**   — 30 mins
   a. **Annual Budget Update**   — 15 mins
      📄 Analytics dashboard - Dashboard.pdf
   b. **Approval of Marketing Budget presented by Marketing Committee**   — PEDRO HERNANDEZ   15 mins
      📄 Marketing_Budget.xlsx

4. **Development Events Update**   — 45 mins
   a. **Gala presenters and auction contributions**   — MABEL CAMPBELL
      📄 Volunteer Roster.docx
   b. **Capital Campaign Progress Report**   — GRACE BAKER
      i. **Board contribution pledges**
         📄 Capital Campaign_ Board Fundraising.pdf

Key Takeaway:

Your agenda is the roadmap of your meeting. Make sure you build it out with essential information, assign times to each topic, and ensure everything's ordered in a thoughtful way.

How To Govern Your Meetings

Keeping your meeting participants civil, respectful, and cognizant of others' feelings is incredibly important when it comes to leading an organization, regardless of the meeting in question.

Particularly in the business world, there are often plenty of egos to contend with, so it's only naturally that discord will arise at some point. That's why organizational leaders should consider the following dos and don'ts to maximize participation and minimize strife in meetings:

DO:

Have a "parking lot"—or running list of items—that needs more discussion outside the meeting. These items can either be discussed offline or added to the agenda for the next meeting.

Give people a mental reprieve by scheduling breaks during longer meetings, so people can stay focused for the duration of your meeting.

DON'T:

Have side conversations. These are just distracting and disrespectful, both to the topics at hand and the people in the room with you. If the same people are constantly chatting with one another, assign seats by setting up nameplates beforehand to split them up.

Slip on the ground rules. These rules are in place to give people a safe space to share ideas without being nervous, so make sure they're enforced.

Be hard on ideas and ask probing questions. Be respectful and thoughtful in your debate, but be sure to encourage questions.

Be hypercritical of anyone who brings an idea or suggestion to the table, even if you are not a fan of the idea. Every serious suggestion should be given equally serious consideration.

According to Donahue, one great place to start is by assigning a governance committee. This committee helps establish the ground rules, components, and guidelines to stimulate culture growth among the board. Together with the organization itself, this governance committee can help spread a productive meeting culture throughout the entire organization.

" **You have all these great minds and perspectives gathered in one space for a very short time each month,"** Donahue said. "It's crucial to make the most of their time together!

Key Takeaway:

Spend time thinking about how you conduct your meetings and what ground rules are in place to keep everything moving. This will go a long way in helping you maintain the flow of each meeting.

How To Boost Participation During Your Meetings

At some organizations, people might be reluctant to speak up or to bring new ideas to the table, especially if they're newcomers to the organization or topic at hand.

> Time and time again, we've seen that if you get people to talk at the beginning of a meeting, you increase the likelihood they will speak up later in the meeting," Donahue said. "So start out by getting people to relax by prompting them to participate early.

Kick off your meetings on a positive note by asking everyone to share a little tidbit about themselves. Some easy icebreaker questions might include:

- What did everyone do this weekend?
- Can you share a time when you shared our mission with a friend, family member, or stranger?
- Why did you get involved with our organization?

- What was one positive thing that happened this week?

- Have you seen any good shows or movies recently?

- What's the best piece of advice you've ever received?

Asking simple questions can get people engaged and kickstart participation for the entire meeting. It's also important to know the people you are meeting with. This is just as true for board chairs and their board members as it is for nonprofit executive directors, corporate CEOs, and their employees.

> **A good rule of thumb is that, when a new person steps in as a leader, this person should try to meet with everyone on their team...one-on-one,"** Donahue said. **"This helps leaders understand what other [team] members hope to contribute, what volunteers would like to learn, or what drew staff members to work for your organization.**

However you approach meetings, your participants will make the most of their time if they trust the process and feel comfortable interacting with one another. That trust must be earned, though. Build trust in the process by starting your meetings on time, ending them on time, sticking to the agenda, and ultimately building a welcoming environment.

Key Takeaway:

If you know your meeting participants and understand what motivates them, you can keep the more talkative attendees under control while encouraging others to be involved.

How To Be More Productive Between Meetings

Almost 70% of Boardable's 2019 Engagement Survey respondents said they had little to no communication between board meetings. Our 2020 Engagement Survey found that the shift to virtual operations made communication much more difficult, resulting in a loss of rapport, networking, and relationship-building between team members.

ALMOST 70% of survey respondents said they had little to no communication between meetings.

While other teams outside of the board may do a better job of following up between meetings to build community and increase accountability, communication is key in every situation. Tracking to-dos, deliverables, deadlines, and tasks between meetings is critical to prevent stagnation and ensure progress is made.

Organizational leaders can increase productivity and enhance follow-up between meetings by:

- Including outstanding tasks and to-dos in the meeting minutes and in follow-up communications with participants.

- Asking your managers and meeting organizers to follow up directly with committees or specific team members.

- Leveraging an online portal to track tasks and deadlines.

- Establishing a culture of responsibility throughout your organization.

- Running a quick Plus/Delta Assessment every six months in which participants can identify what's going well with meetings and what could be improved.

Often, you'll have highly productive meetings where your team harnesses its collective brainpower to overcome challenging obstacles that your organization's executives need help tackling. The last thing you want is for all of these brilliant ideas to go to waste when nothing actually comes of them. The idea behind having a plan in place to maintain productivity between meetings is to not let any vital tasks fall by the wayside.

Key Takeaway:

While your meetings are when team members collaborate on innovative ideas, the time to act is between those sessions. Having a plan in place to assign and follow up on action items will ensure all deliverables are complete.

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Conclusion

No matter what team you lead or what industry you work in, the need for productive meetings spans across your entire organization. Productive organizations easily have dozens of meetings every day. Maximizing every moment together to solve problems, answer questions, and make plans is crucial to advance goals and help everyone feel valued.

Using these tips, you can develop an actionable roadmap for your meetings, eliminate distractions, and maximize participation both in and out of the meeting room. Paired with the right meeting tech, these best practices become immensely simpler. Now, get out there and start having your best meetings ever!

Ready to reimagine your approach to meetings?

See how Boardable can empower your organization to host highly productive and engaging meetings.

About Boardable

As leaders in the space, we understand the frustration you feel (and the hours you lose) just from organizing board meetings — let alone staying productive and communicating between them via email, phone, and text. We've lived that reality. After tirelessly searching for the right solution but not finding it, we decided to build it ourselves!

Boardable is an online board management platform that centralizes communication, secure document storage, meeting planning, and everything involved with running a board of directors. Founded in 2016 by nonprofit leaders and founders, Boardable has a mission to improve board engagement for nonprofits. Boardable is based in

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