



marketing toolkit

meetings – ensuring success

Preparation

- Define a clear goal
- Select participants and require consistent attendance
- Decide the form of the meeting (in-person, phone or web conference)
- Set date and start and end time
- Distribute agenda and provide supporting material
- Request that everyone is prepared
- Designate one person to take notes during the meeting. Consider rotating this function.

Actual Meeting

- Start on time and end on time
- Repeat the goal of the meeting
- Provide updates on tasks from previous meeting(s) if applicable
- Follow to the agenda, stay on time
- Stay focused, place new topics on parking lot for next meeting
- Take clear brief notes and distinguish between informational notes and decisions
- Assign tasks, assign each task to one person and set due date
- At the end of the meeting:
 - summarize all decisions and tasks
 - schedule follow-up meeting if required

Follow-up

- Distribute minutes as soon as possible & file them for easy access
- Communicate tasks to task owners
- Track tasks and follow-up if not completed by due date
- File minutes in a place where you can easily find them

Ground rules

Ground rules create a productive environment where everyone can contribute in a meaningful way.

- No cell phones or side conversations
- Request proper preparation
- Attendance means participation
- It is OK to have different opinions, but communicate a unified decision outward
- Make sure tasks are executed

Direct questions to:

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