Meeting Strategy

Get the most out of your meetings

NEXT LEVEL
COACHING & PERFORMANCE IMPROVEMENT

Meeting Strategy

1. Objectives
The reason for holding this meeting is what?
The reason for holding this meeting is

2. Evidence of Success
*The output of a **<u>successful</u>** meeting will be what?*
I will come away from a successful meeting with

3. Preparation	
For this meeting to be successful and achieve this output:	
a. Who needs to be there?	*b. What do they need to prepare in advance?*
From the client company?	
From our company?	
c. What do you need to prepare?	

Meeting Strategy

4. Barriers to Success	
What could prevent this meeting from being successful?	*What could you do to overcome these barriers, should they arise?*

Meeting Strategy

5. Questions
For this meeting to be successful and achieve this output, what questions do you need to ask?
***Before** the meeting:*
***In** the meeting:*

Meeting Strategy

User Notes

What is the purpose of the Meeting Strategy tool?
The Meeting Strategy tool is designed to help you think strategically about an upcoming meeting, either with a client or internally to your business, so that you can be more in control of the meeting and more intentional and proactive in your approach. All of this will help you get more from the meeting and make that time spent even more valuable to you and to those who attend.

When is it most valuable?
The Meeting Strategy tool can be used to prepare yourself for any sort of meeting or conversation, of which there is a specific purpose or output required. It is particularly helpful for meetings with external suppliers or clients where interactions may not be frequent, and you want to get the very most out of the time you have with them.

Another useful benefit of using the Meeting Strategy tool is to reduce anxiety before a big and important meeting. Going through the questions in this tool will help to bring clarity, focus and direction – all of which will reduce stress.

How do I use it?

- The Meeting Strategy tool is designed to be easy to use. It need not take a long time, but the more time and focus given to the questions it contains, the more valuable the exercise will be for you.

- Furthermore, the further in advance of the meeting you use this, the more time you will have to make the necessary preparations that come from the exercise, and the more helpful the overall process will be.

- ***It is important to work through the Meeting Strategy tool sequentially.*** For instance, if you are short on time and can only answer one question, then let it be Section 1, not 4.

- There are no 'wrong' answers to these questions. They are guides to facilitate strategic thinking, not test questions designed to catch you out.

Each section of the Meeting Strategy tool follows the same basic structure:

Section	**1. Objectives**
Guiding question	*The reason for holding this meeting is what?*
Your thoughts and ideas	The reason for holding this meeting is

Meeting Strategy

Section by Section Guide

Skip to…

Section 1 - Objectives

The guiding question here is *"The reason for holding this meeting is what?"* This may seem basic, but most people skip it. How many times have you sat in a meeting where no-one knew what it was really about? Was that a valuable meeting for you?

Articulating what the reason for meeting is will bring clarity of purpose to you and those attending and allow them to better prepare. If you are requesting the meeting, it is worth answering this question before scheduling it – sometimes you may decide there is no reason other than *to have a meeting.*

If you are not the one who has scheduled the meeting it is worth asking what the meeting is about and what the goals of that meeting are. (A polite and respectful way of finding this out is to ask, *"So that I can properly prepare, what do you want to get from this meeting?"*).

Example

1. Objectives
The reason for holding this meeting is what?
The reason for holding this meeting is *to understand and decide on the measurements of success for the client and agree a schedule to meet and check in on progress to achieving that goal. I also want to know how they were doing before working with us, so I know what the 'baseline' for success is.*

Section 2 – Evidence for Success

It can be tempting to answer Section 1 with an abstract answer (such as *"To build rapport with the client"*). Whilst this example is not a bad or unworthy goal, it is intangible and difficult to know whether it has been achieved.

To help clarify and define the goal, and to help you better prepare for it, Section 2's guiding question is "*The output of a **successful** meeting will be what?*" which can only be answered with a product or tangible evidence of success of failure.

N.B. 'Successful' in the context of this Section is defined as having achieved the objectives set out in Section 1.

Meeting Strategy

Example

2. Evidence of Success
The output of a ***successful*** *meeting will be what?*
I will come away from a successful meeting with *the client's metrics for measuring the success of our solution, historical data to provide a baseline for progress, and their metrics for a successful output of the process. I will also come away with a schedule for meeting to review progress and at least the next 2 meetings booked in.*

Section 3 - Preparation

Now that you have articulated what you want to come away from the meeting with, it is time to think about what steps you and others need to take to make that happen.

Notice that there are three parts to this Section's guiding question:

a. Who needs to be there?
b. What do they need to prepare in advance?
c. What do you need to prepare in advance?

As with the rest of this document, for best results answer these questions sequentially. They are in this order to minimise the risk of forgetting something.

Example

<table>
<tr><th colspan="2">3. Preparation</th></tr>
<tr><td colspan="2">For this meeting to be successful and achieve this output:</td></tr>
<tr><td>a. Who needs to be there?</td><td>b. What do they need to prepare in advance?</td></tr>
<tr><td>From the client company?
The head of department
The financial controller</td><td>• They will need to think about and provide the data that they will use internally to track progress. (They might need permission to share this with someone outside the company.)
• They will need to look back at the historical data as well
• Their availability for the next few months</td></tr>
<tr><td>From our company?
My line manager?</td><td>• It might be worth my line manager being involved in the meeting to help the client define and decide measures for success if they don’t already have some.</td></tr>
<tr><td colspan="2">c. What do you need to prepare?</td></tr>
<tr><td colspan="2">• My calendar and availability for the next few months, with spaces for potential follow-up meetings
• An agenda, so they know the points we will need to cover
• Find out what they need/want from this meeting
• Make sure my line manager is available
• Ideas for metrics to track success (if my line manager cannot make the meeting)
• Book a meeting room
• Any relevant documents for this client
• Check the A/V features at the venue</td></tr>
</table>

Section 4 – Barriers to Success

The reason that most strategies fail is that they assume everything will go according to plan.

By identifying possible barriers to successfully achieving a goal, you can have a plan, B, C and D ready to go should the need arise. In order to do that, you first need to think about what could go wrong, rather than hoping for the best.

These barriers need not be large problems – even identifying the smaller obstacles will help bring clarity and facilitate more thorough preparation.

Meeting Strategy

Example

4. Barriers to Success	
What could prevent this meeting from being successful?	*What could you do to overcome these barriers, should they arise?*
My train could be delayed/cancelled (so I can't make it)	*Aim to get the train before, allowing for time to react and still be on time if the trains aren't working*
One or both of the representatives of the client company might not attend	*Call them both to confirm attendance. If one cannot attend last minute, proceed with the meeting but make sure to schedule a follow-up conference call/meeting with both participants at the earliest convenient time.*
There may not be a way to connect my laptop to the projector	*I can call the venue ahead of time to find out what connections they have and what I need to bring.*

Section 5 – Questions

By now you will know what success looks like, what problems may arise and plans to deal with them, and what you need to prepare.

In most meetings, particularly client meetings, it is far more productive to ask questions. The better the question, the better and more complete the answer, and the greater the level of discovery and understanding you will achieve.

The right questions in a meeting will be the difference between a poor, a good and a great meeting. Some questions will need to be asked ahead of the meeting, and some will need to be prepared for the meeting. Section 5's guiding question is "*For this meeting to be successful and achieve this output, what questions do you need to ask?*" and is designed to get you thinking about the information you need to uncover to achieve your goals, and therefore what questions to ask to uncover it.

Meeting Strategy

Example

5. Questions
For this meeting to be successful and achieve this output, what questions do you need to ask?
***Before** the meeting:*
(To the client) We will be discussing the measurements of success and how we'll know how the process is working in this meeting – who else should be there? *What time will you (the client) need to be away from this meeting by/How long do we have?* *What do you (the client) want to get from this meeting?*
***In** the meeting:*
What will the evidence be that our (product/service) is working for you? *Have you ever seen this kind of result historically? Is this result realistic?* *Is there anything else I should know that I haven't already asked about?* *Do you prefer face to face communication, email or text?* *If I see something that might prevent us from achieving your goal, who should I notify first?* *Tell me more about…?* *Is there anything else?*

For any further questions please do not hesitate to contact your Next Level Coach.