

Meetings playbook

Overview:

This Meetings Playbook provides a framework for establishing effective meeting practices in your organization. It serves as both a practical guide and a statement about how your company values collaboration and time.

A well-implemented meetings playbook increases productivity by eliminating unnecessary meetings while making necessary ones more efficient. It improves decision-making through better structure and preparation, enhances employee experience by reducing meeting fatigue, and establishes shared expectations that reflect organizational values.

To successfully adopt this playbook, customize it to your organization's specific context, secure leadership buy-in, and begin with a pilot group before expanding. Provide clear implementation guidance, review periodically to incorporate feedback, and ensure managers consistently model these behaviors.

The template covers when meetings are necessary, principles for effectiveness, preparation guidelines, calendar management expectations, and protocols for handling meetings during absences.

When to schedule a meeting:

Good meetings aren't about sharing information (that could have been sent asynchronously). They are not about seeing and being seen. And they are not about giving status updates.

Blockers:

If you've hit a blocker, your project has stalled and need a meeting to move things forward, solve a glitch, or fix a mix-up, then think – can this wait until the next weekly meeting? If not then call a meeting following [company name]'s 11 meeting principles (shared below).

Me me me:

If it's going be one person doing all the talking and no real group participation, maybe it's time to consider another way – like a quick asana update or an explainer video.

Kicking off a new project, working group or training session:

Think – can this be added as a deep dive within an existing upcoming recurring meeting/ team meeting? If so, reach out to the meeting owner in advance and add to the upcoming agenda. If not, then call a meeting following [company name]'s 11 meeting principles.

Recurring meetings:

Sometimes weekly meetings start to feel like Groundhog Day. It might be worth asking yourself if this week's meeting is really going to bring value. Maybe not everyone needs to share something beyond a status update. If not, don't be afraid to give that meeting the slip. Just because it's on the calendar every week doesn't mean it's etched in stone.

[company name]'s 11 meeting principles**1. Purpose**

Every meeting needs a purpose. A meeting without a clear purpose =worthless

Determine the purpose of the meeting and establish clear objectives or desired outcomes.

The meeting purpose should be included in each meeting invite (a couple of bullet points should do the trick).

2. Ownership

Meetings shall have an owner responsible for:

- Scheduling the meeting in advance
- Leading the meeting
- Shaping and publishing the agenda (ensuring agenda is updated/ is reflected in meeting agenda)

The owner should designate a designee should they be unable to attend.

3. Timing

Scheduling principles: Keep to 25 mins where possible – If an hour is needed, keep to 50 minutes where possible.

Respect the [insert company hours] rule: No internal meeting to take place outside of [insert company hours].

Exceptions may be made for urgent matters or time-sensitive projects. Such exceptions should be minimized and kept to a minimum.

For ad hoc meetings, use the 80/20 rule (if 80% are available, then schedule).

4. No agenda, no attenda

Simple is best!

Share the agenda to all participants well in advance of the meeting (either in the invite description/with a doc attached), This allows people time to prepare, gather relevant information, and contribute meaningfully.

Conclude meetings with a summary of next actions, deadlines, and DRIs.

5. Only invite relevant participants

Meeting participants shall be determined by the meeting owner in advance. Only invite individuals whose presence and contributions are essential to achieving the meeting's objectives.

If you are invited to a meeting and you're not sure what for, ask the meeting owner for clarification. If anyone is optional, this will be reflected in the invite.

Limit of 5-10 where possible to follow *the 2 pizza rule.

The "Two Pizza Rule" is all about keeping meetings small and cozy. Imagine, if two pizzas can't feed the whole group, it's too big! This helps keep meetings more efficient and less crowded, promoting more focused and productive discussions by reducing unnecessary attendees.

6. Make every minute count

Respect people's time – never run over. Every minute counts.

No meetings to start late! The meeting owner must take control, start the meeting and move on. If you're running late, you're expected to communicate with the meeting owner.

7. Fail to prepare, prepare to fail

Come prepared to the meeting and have insights and questions.

- Read the agenda & any pre-reading, and
- Be prepared to speak to your topics should you be assigned any.

8. Teams that talk equally succeed more frequently

Encourage active engagement and participation from all attendees, creating an inclusive environment where ideas, opinions, and perspectives are valued.

Promote open and respectful communication, allowing each participant to express their thoughts without interruption or fear of judgment.

Criticize behaviour, not people.

9. Stay focused and maintain direction

Keep discussions focused on the agenda items and avoid unrelated tangents or excessive digressions. Use effective facilitation techniques to guide discussions, ensure clarity, and manage any conflicts or disagreements constructively.

10. Outcome-focused

Document action items and follow-Up:

- Assign action items, responsibilities, and deadlines during the meeting.
- Summarize key decisions and action points in meeting minutes/Asana boards/notes, and share them with participants after the meeting.

11. Feedback

Constructive feedback empowers growth. If there's a way to improve a meeting or you're finding a meeting super valuable, don't forget to provide real-time feedback via [insert your employee experience platform].

Personal calendar management expectations

Effective calendar management helps maintain productivity and ensure that meetings are conducted efficiently and with minimal disruptions.

- Put time in your calendar for breaks.
- Put time you need to focus on work in your calendar.
- Feel free not to accept meetings that have been scheduled over other things in your calendar.
- Use 25-minute and 50-minute meetings to ensure you have time to decompress.

- Set working hours in your calendar and set your location with the timezone if you're working from a different location than usual.
 - Do not schedule over meetings, breaks, or focused time in other people's calendars without permission.
 - Notify relevant parties in advance if there's a need to reschedule or cancel a meeting due to unforeseen circumstances.
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When on annual leave

- Assign a new meeting owner to cover any owned meetings taking place whilst you're away in advance.
- Decline any meetings you would usually attend ahead of your time off. Reach out to the meeting owner to make them aware, share any information, provide information on any previous action points, or to add talking points you'd like raised to ensure these are covered in your absence.
- Set your OOO in calendar so new meeting invites that may come through whilst you are out are automatically declined.