

Do We Need a Meeting for This?

A Practical Guide to Saving Time + Better Collaboration

First, Ask Yourself:

- 1) What is the goal of conducting this meeting?
- 2) What materials (decks, links, outlines) can I send in advance so people can come with core knowledge and spend the meeting actively engaged with each other?
- 3) Instead of meeting, can people just review those materials independently and then respond via Slack channel or other means?

If You Need the Meeting:

People must be there live in the moment to engage and contribute to something.

- We're building something together.
- We're strategizing together.
- We're discussing a project's status.



It is critical there be a regular cadence for the development of relationships and strategy for a project or shared priorities.

- We need to meet regularly to align around vision and strategy.
- We need to meet with other teams to better understand their needs + priorities.
- I want to check in with individuals on my team around culture, work, or growth



I have questions about a product, service, or project.

- I need clarity or advice.



I need a status update on what's done and what's still left to do.

- We're discussing activities that reflect a project's overall status.



My team needs to get something done together quickly.

- We're creating something with immediate turnaround.



Meeting Types

Team Meeting (Strategic)

Convening a team for a check-in around strategies, priorities, challenges, and/or opportunities. Can be specific to a team or project. Can be a project kick-off or recurring.



Team Stand-Up (Tactical)

Convening a team very briefly (30 min. or less) to check in on individual tasks and roadblocks. Usually specific to a project. Can be recurring.



Working Session

Convening a team for an *active* meeting where individuals are devising and creating concrete outputs. Consider starting the session by articulating a list of tasks to be completed.



Consulting Session

Brainstorming and getting input on a project based on sourcing expertise within the organization. Usually with cross-organization participation, and used to initiate a project. Come prepared with questions and ideas ...but mostly questions.



1 on 1

Making time to have a direct, uninterrupted conversation with someone around strategic or tactical activities. This is also a recommended regular occurrence between managers and team members.

