UCSF

Tips to Run an Effective Meeting

Plan

- Make your objective clear. What is the purpose or value of the meeting? Decision, discussion, etc.
- What can be accomplished outside of a meeting, e.g., editing documents?
- Who needs to be there?
- Set and share an agenda in advance whenever possible.
- How much time do you need?

Etiquette

- Stay on topic.
- Make it psychologically safe for everyone to speak up and express opinions.
- Be clear about whether you are inviting comments in the chat function in the meeting.
- Put your phone and other technology away when possible.
- Start on time, end on time.
- Be flexible when other people have to step away/be off video.

Structure

- Set an agenda.
  - Consider adding time allotments for each discussion.
  - Let people know if they will be asked to make a decision, brainstorm, etc.
- Create standard breaks between meetings by shortening 30- and 60-minute meetings to 25 and 50 minutes respectively (or less if possible).
- Use a standard start time of :05 or :10 after the hour.
     Tip: Include the meeting start time in the subject line of the Outlook invitation to reinforce this standard.
- For meetings longer than one hour, start at :10 after the hour and offer stretch breaks in the middle of the meeting.
- If no visuals e.g. slides, consider "walking" meetings for a zoom-free conversation.
- If reading material is sent in advance, don't walk through the documents in the meeting.
- Build five minutes at end of meeting to conclude with next steps and responsibilities. Consider asking the group to rate the meeting and provide feedback on what worked well and what could be improved.
- Follow up with action items in writing. Who is doing what, by when?
- Click here for Zoom web conferencing FAQ and training, including instructions on downloading the Zoom Plugin for Microsoft Outlook.