

Crabby's criteria for effective meetings

Applies to: Microsoft Office Outlook 2007, Outlook 2003

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Crabby Office Lady

So you want to call a meeting. What's the best way to do it? And once everyone is gathered together and staring at you, anticipating your pearls of wisdom, what's next? Keep reading.

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It's your meeting and you have every right to run it how you please, right? I suppose so, and everyone has a unique style of leading a meeting. I think you know what I mean:

- **The headmistress** Stands at the head of table with her arms crossed and silently waits until all eyes are upon her before calling the meeting to order. Great technique for keeping order and scaring your attendees; lousy if collaboration and brainstorming are part of the plan.
- **The free-wheeler** Lets everyone shout out their ideas, go out for snacks, talk amongst themselves, and make paper airplanes out of the handouts. Fun times? Heck, yeah. Organized and productive times? Probably not.
- **The stickler** Total control freak; keeps a copy of [Robert's Rules of Order](#) on hand and is constantly thumbing through it to ensure there are no infractions. Orderly? Of course. Successful? It depends on what your idea of "successful" is...

Whatever type you are, you could probably benefit from a quick overview of some guidelines to help you get the most from your meetings. For today's column, I've outlined three steps to creating and running a successful meeting.

Step 1: Determine the purpose of the meeting

What's the best way to get to Carnegie Hall? Practice, practice, practice. And what's one of the best ways to ensure a successful meeting (on your part, anyway)? Plan, plan, plan.

Creating a meeting agenda that gives an overview of the points you want to discuss is a great way to make sure that you don't show up unprepared. And, by golly, we have templates for just that very thing (the "agenda" thing, not the "unprepared" thing ... we can all create that on our own):

- [OneNote meeting agenda \(with outline\)](#)
- [Word agenda \(Capsules design\)](#)
- [More meeting agendas](#)

Now, we're going to send this agenda out to every person who is invited to the meeting. You also want to be sure to figure out if you'll need audio or visual aids (a projector, handouts, etc.) and, of course, your snack plan. Snacks can be good — shall we say — *motivators* for invitees to become attendees. My mother once told me: The best way to a man's free hour between 3 and 4 is through his stomach (or something like that).

Step 2: Call the meeting

Now that you have your game plan, you'll need to get everyone you need in the same room together. (If you're using [Live Meeting](#) because you're working with folks from all over the globe — or you're just a crabby misanthrope — you'll still have to get them into the same *virtual* room together.)

The easiest way I know to do this is to send out a meeting request using Outlook. Even though you've probably done this a zillion times, let's review anyway, because I have some hot tips for you.

- [Schedule a meeting](#)
- [Schedule a resource](#) (such as a conference room)

NOTE This feature requires you to be using a Microsoft Exchange Server e-mail account.

- [Create an Outlook meeting request in OneNote](#) If you have Outlook 2007 installed, you can schedule meetings while you take notes in OneNote 2007.

Be sure to add your agenda using the **Insert file** menu. And, if your meeting is one of a series of meetings, or if there is a lot of planning on both your part and your attendees' parts, perhaps creating a **Meeting Workspace** (which requires Outlook 2007 or 2003) is the way to go. That way you can have a centralized place for people to collaborate on a project and have a record of what was decided in a meeting.

- [Keep it together with a Meeting Workspace](#)
- [Demo: Work together in a Meeting Workspace](#)

Step 3: Get all your documents in a row

OK. Everyone is here, enjoying the snacks and going over the agenda that you so efficiently sent out with the meeting request. You've asked everyone to sign in so that we can berate those who didn't show up:

- [Meeting sign-in sheet](#)

Now it's time to actually start the meeting. First, it's good to go over what you're going to discuss, and make sure everyone knows everyone else. Then you can jump right into your presentation, documents, spreadsheets, or whatever else you've brought to talk about. The time-honored way to keep track of all that's being discussed is to have someone take meeting minutes. I like to volunteer the person right in front to do it (hey, if he's going to show up early and play teacher's pet, he has it coming):

- [Meeting minutes in Word](#)
- [Meeting minutes for e-mail](#)
- [Meeting minutes in OneNote](#)

At the end of the meeting, make sure you talk about what needs to happen next ("action items" we like to call them), and also let your attendees know when and where you'll be posting the results of the meeting. You can either put the meeting notes up on a [Meeting Workspace](#) or other team Web site or send them out in e-mail. That way everyone will have a point of reference for what was discussed and decided. This is particularly helpful for those folks who looked like they were taking copious notes but who were actually composing their grocery lists.

More meeting references on Office Online

As you can see, the three steps above highlight very basic ways to make sure your meeting is a success. I know this isn't rocket science, but you'd be surprised how much meeting time is wasted because of a lack of easy preparation. Every meeting has its own set of special circumstances, so come prepared. Chances are, you (not to mention your attendees) will get more out of it than if you just, say, ran down the hall shouting, "Meeting! Meeting in two minutes! Meeting! Last one in is a rotten egg!"

Check out some more detailed information about scheduling, getting results, and keeping track of what actually went on behind those closed doors.

- [Schedule meetings efficiently](#)
- [Managing meetings](#)
- [Delegate Access: Let someone else mind your busyness](#) (Training course)

- [More meeting templates](#)
(Because while you can have too many meetings, you can never have too many meeting templates.)

"When I give a lecture, I accept that people look at their watches, but what I do not tolerate is when they look at it and raise it to their ear to find out if it stopped." — Marcel Achard

About the author

[Annik Stahl](#), the Crabby Office Lady columnist, takes all of your complaints, compliments, and knee-jerk reactions to heart. Therefore, she graciously asks that you let her know whether this column was useful to you — or not — by entering your feedback using the **Did this article help you?** feedback tool below. And remember: If you don't vote, you can't complain.

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