

TIPS FOR MEETINGS



These are some tips for making meetings go well.

Think about the 5 Ws: who, what, when, where, and why. Use the blank spaces below to write down information you might need before, during, and after your meeting.

BEFORE THE MEETING

WHO WILL BE AT THE MEETING?

WHO IS A SUPPORT PERSON THAT YOU CAN BRING WITH YOU? You may want them to take notes, help you focus, or ask questions you don't feel comfortable asking.

WHY ARE YOU MEETING? IS THERE A DECISION TO MAKE OR INFORMATION TO SHARE?

WHAT DO YOU WANT FROM THE MEETING?

- Do you need questions answered or more info?
- Do you disagree with a decision that has been made?
- Do you want to ask for something?

WHAT DO I NEED TO BRING? You might need a pen and paper, previous meeting notes, or agreements you have signed.

WHAT DO YOU WANT TO SAY? WHAT DO YOU WANT PEOPLE TO HEAR OR KNOW?
WHAT ARE YOU ASKING FOR?

WHAT QUESTIONS DO YOU HAVE? You can make a list ahead of time to keep you focused, or write a letter to read at the meeting.

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AT THE MEETING

WHO IS AT THE MEETING AND WHY? Meetings usually start with introductions. If this one doesn't, you can ask for people to explain who they are and why they are there. **Ask people for their business cards if you need to follow up with them.**

ASK FOR SOMEONE TO RECORD ATTENDANCE AND MEETING NOTES. This is so you have a record of who is there, and what they said. Did someone say they would do something after the meeting?

ARE THERE TASKS FOR YOU TO DO AFTER THE MEETING? Who can help you with those tasks?

ASK FOR A BREAK IF YOU NEED ONE. Do you need to use the bathroom, or are you becoming upset and need time away? Ask for everyone to take a break from the discussion if you leave the room.

IF PEOPLE COMMIT TO DO SOMETHING, ASK FOR A DEADLINE. When will they complete this task? Tomorrow? In a week? In a month?

SET UP THE NEXT MEETING PRIOR TO LEAVING. Is there a need for another meeting? Which days, times, or places are best for you to meet?

THANK PEOPLE FOR THEIR TIME.

NEXT STEPS:

AFTER THE MEETING

WHAT DID OR DID NOT GO WELL? Is there anything you would do differently next time?

FOLLOW UP WITH ANYONE WHO SAID THEY WOULD DO SOMETHING. Did you get the information or answer that you asked for? When are you supposed to hear back?

DID YOU GET WHAT YOU NEEDED OR WANTED? IF NOT, WHAT CAN YOU DO NEXT? Call a support person? Follow up with someone's supervisor? Ask for another meeting?
