

THE ONLY MEETING OUTLINE YOU NEED

I was on the executive management team at a fast-growing non-profit with an aggressive vision. Everyone was working at an intense pace, with a lot of moving parts, seven days a week. *And, I only had one 60-minute meeting with our executive director every other week.*

Obviously, the list of topics I *wanted* to review with him outnumbered the minutes *available* to work with him. Looking for a way to sharpen and prioritize my talking points to optimize our short time, I talked to a friend over lunch. She sketched a rough meeting framework she had used in the past. Gears started turning. I bought her lunch. And, left to make my own.

Game changer. Not only did this meeting outline help me steer time with my executive director, it changed the way I managed myself, led my staff, and worked with my peers. *Over the years, I have shared this meeting outline with people at every organizational level, and it has never failed.* Anyone can use it to:

- **Make meaning with short meetings.**
- **Focus on what matters most.**
- **Get relevant feedback.**
- **Keep things moving.**

Just a few simple cues going into and coming out of a meeting can help anyone productively lead your staff, and your organization, at a higher level.

1 BEFORE MEETING ARRIVAL

Tool tip: Use categories as a meeting guide to keep focus, invite relevant input, and avoid getting into the weeds. By steering conversations with this format, you're demonstrating your capacity as a leader - not just a doer.

WHAT'S FINISHED

High level FYI of the big rocks you're moving. Not for punch list items.

WHAT I'M WORKING ON

Big picture FYI projects in motion. Feedback loop for clarity questions and input if needed. Keep at project, not punchlist, level.

WHAT I NEED FROM YOU

Get specific about the action or support you need to keep things going, it could be approval, advice, content, intel, exec level advocacy, etc.

2 BEFORE MEETING DEPARTURE

Tool tip: Next steps summary for clarity and collaboration. Make sure the right people know about meeting outcomes at the right time.

WHAT DECISIONS WERE MADE

WHAT NEEDS TO BE SHARED

Directive.

WHAT CAN WAIT

WHO I NEED TO MAKE TIME FOR A CONVERSATION WITH

Not directive.



Create alignment in your organization
so you can accomplish your purpose.
We are here to help you lead at a new level.

**Ask our experts a question or schedule a 30 minute
consultation—no charge.**

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