

Effective Executive Team Meetings

Well-managed meeting and internal communications processes are essential for a successful executive team. You can improve your meeting effectiveness through the following four steps, beginning with proactive preparation.



PREPARE for the meeting

- Create a written agenda
- Double check to ensure the right things are on the agenda
- Read materials in advance

Use the agenda template on the next page to get started!



LEAD the meeting



COMMUNICATE after the meeting



EVALUATE meeting effectiveness

Executive Team Meeting Agenda Template

Use this template to build an agenda for your next executive team meeting. The steps on the next page can help you hold effective meetings using this template as a guide.

Date: _____ Meeting type: _____

TOPIC	PURPOSE	LEADER	PREPARATION	TIME
Frame as a question	E.g., decision, discussion, learning	Name of topic owner who will facilitate discussion	Pre-reads or other preparation expected of participants	Duration

Wrap up:
 What decisions did we make today?
 What actions do we need to take? Who is responsible? By when?
 What do we need to communicate? To whom? By when?

Agenda Template: Instructions

1 Prepare for the meeting

- Identify agenda items
 - Seek input from the team, but the CEO finalizes agenda, focusing on items aligned with the work of the team (e.g., high stakes/interdependence)
 - Cancel the meeting if there are no critical agenda items
- Develop a written agenda
 - Pose each agenda item as a question to make clear the purpose of the discussion (i.e., are you deciding, providing input, learning, or aligning on messaging?)
 - For each topic, clarify who will lead it, what preparation is needed, and how long the discussion will be
 - Assign meeting management roles (e.g., facilitator, recorder, timekeeper)
- Share agenda and materials in advance
 - Set a norm for how far in advance the agenda will be sent out
 - Clarify what preparation is expected and hold members accountable for doing it

2 Lead the meeting

- Begin meeting by reviewing agenda and roles
 - Review any follow-up action items from previous meetings
- Stay on track during meetings
 - Have a timekeeper for each agenda item and keep a “parking lot” of items to come back to at a later time
 - Make the agenda visible in meetings to keep everyone aware of the schedule
- Decide how to address new “urgent” items surfaced during meeting (CEO is decision maker)
 - Hold until the next meeting
 - Change the agenda
 - Cover with specific individuals outside of team meeting

3 Determine how to follow up after the meeting

- Leave time at the end of every meeting for a wrap-up, even if it means postponing some agenda items
- Wrap-up meetings by recording decisions, actions, and communication required
- Circulate decisions, actions, and necessary communications to all participants quickly after meeting
 - Hold the team accountable for executing follow-up actions
 - Keep an ongoing record for future meetings

What decisions did we make today?

What actions do we need to take? Who is responsible? By when?

What do we need to communicate? To whom? By when?

4 Evaluate meeting effectiveness (e.g. every three months)

- Review past agenda items and wrap-up documentation
 - Ensure the team is focused on the “right work” (modify the list of work as appropriate)
 - Ensure processes for setting agendas, managing meetings, and follow-ups are observed and effective

Agenda Template: Client Example

Senior Leadership Team¹ Meeting

August 19, 2019 - Monthly Meeting Agenda

Facilitator: Emmanuel

Timer: Louise

Topic/Item	Owner	Time (min)	Role of Team	Prework
Follow-Up Items				
Credit Card Policy	James	-	Share and update	See written updates template ²
Draft Accounts Payable Policy	James	-	Share and update	
RSM Annual Audit Fieldwork	James	-	Share and update	
New Items				
2019 Employee Engagement Survey Results Overview	Maria + OD Team	40 minutes	Share and update	None
SLT Shared Administrative Assistant	Maria	10 minutes	Discussion	None
Contract Management Policy	Anne	10 minutes	Review and discuss	Read policy and authorization document
Strategic Plan Updates	Jennifer	15 minutes	Discussion	Review new one-page overview document
Virtual Town Hall Preparation	Louise	10 minutes	Discussion: timing & call for proposed discussion topics	None
Next Steps/Action Items/Assignments	Emmanuel	5 minutes	Confirm the plan	None

1 This healthcare organization refers to its executive team as its senior leadership team (SLT). The follow-up items aren't discussed during the meeting. They are included in a written update, which the CEO expects everyone to read before the meeting.

2 See an example of the written updates template in Bridgespan's Executive Team Toolkit online at www.bridgespan.org/special-collections/executive-team-effectiveness-toolkit.

Effective Executive Team Meetings: Peer Perspectives

If your executive team suffers from unproductive meetings, it could be that you don't have a good agenda-setting process. Many executive teams have used the agenda template tool presented in this toolkit to help them achieve more effective meetings and communication processes. Here, the chief of staff of a healthcare organization and CEOs Dorri McWhorter of YWCA Metropolitan Chicago, Eric Robbins of the Jewish Federation of Greater Atlanta, and Kirstin Chernawsky of Erie Neighborhood House share their approaches to making their meetings and communications more effective.

How does the executive team prepare for its meetings?

"Before, we had a standard agenda that just listed topics, without information about the time required for discussion or who would lead the conversation. Team members would submit topics to the CEO and myself, and we would build the agenda," said the chief of staff of a healthcare organization. "Now, we rotate who facilitates each meeting. The facilitator asks the team for agenda items a week before the meeting and puts the agenda together based on the template we have created. Sometimes we don't have enough time to cover all of the submitted topics, so it's the facilitator's job to decide what the team will discuss and what should be shared as a written update. The facilitator goes back to the list of executive team priorities that we've created and says, is this something that falls in the executive team quadrant? (See "Work of the Executive Team" on page 8.) If it isn't, then it's probably an item that either doesn't go on the agenda at all or becomes a written update.¹ All written updates go into a shared pre-read folder for the meeting, and everyone is required to review this.

"The agenda template also clearly identifies the role of the team. 'Is this a decision? A discussion? Are we reviewing a document? Is this a brainstorm?', he added. "Each team member is going in our own directions during the day, but this helps clearly set the tone for the meeting and each topic."

CEO McWhorter and her team create their meeting agendas via a shared Google document. "Team members add their suggested topics with their names by them, and I go in and decide whether or not to make it part of our official agenda," McWhorter said. "There's also a notes column, and if I don't select a topic for our agenda, I can say in the notes section whether we should cover this in another meeting, like our program leadership caucus."

"Using this Google spreadsheet has created a much more transparent agenda-setting process, because team members can see each other's input on the agenda. Before, there was no transparency around other proposed topics: things went to me in a vacuum," she added. "Now, if I don't select someone's topic, they can at least see the selected items that have greater urgency or importance."

¹ See an example of the written updates template in Bridgespan's Executive Team Effectiveness Toolkit online at www.bridgespan.org/special-collections/executive-team-effectiveness-toolkit.

How do you approach meeting facilitation and keeping meetings on track?

“We identify someone to play the role of timekeeper at our meetings,” the chief of staff of a healthcare organization said. “At first, the timekeepers asked, ‘How can we keep the group on time and be polite? We don’t want to cut people off.’ But we realized that respect goes two ways—if we ask for a 90-minute meeting, it should be a 90-minute meeting. So now, we set a timer for an agenda topic’s assigned time. Once it’s up, we move to the next topic.”

As noted above, the healthcare organization’s executive team members take turns facilitating meetings. “This process ensures that none of this is a burden on one person,” reflected the chief of staff. “This has created an opportunity for shared management of this team, as opposed to a top-down approach. It has also helped us naturally adopt similar facilitation norms, because we are watching each other lead these sessions. There has been a lot of value in this.”

Erie Neighborhood House also rotates meeting facilitators. Reflecting on the benefits of this approach, Executive Director Chernawsky said, “Rotating meeting facilitators can create professional development opportunities for team members. The variety helps address different learning styles on the team, and rotation also creates buy-in for our meetings and increased understanding of behind-the-scenes work that goes into our sessions together.”

What have been the benefits of using this agenda-setting process and new agenda template?

“It’s so simple, but it is a huge value add,” noted the healthcare organization’s chief of staff. “Building an agenda like this requires intentional thought about what should actually make it onto the agenda, and what information people should know before going into the meeting to enable a productive conversation. We live in a culture where we often assume that everything will happen in the meeting—but things have to happen before you walk in the room. We’re trying to roll this out agency-wide, for both internal and external meetings, simply because we have seen how much value it has added for our executive team meetings. Now that we set time limits for items, we actually get through them faster. We learned about the value of shared time, and are utilizing this more effectively.”

Being this thoughtful, however, does take time. “Our agenda creation process is now more time consuming, but at the end of the day it’s well worth the additional time,” McWhorter said. “This process ensures that things aren’t falling through the cracks and that we’re spending time on the right things. Big picture, we are all working so much better together. We are more effective and enjoy the work more. Now, we don’t do updates for the sake of updates, and we don’t waste our time on having unnecessary conversations. We are much more focused and highly disciplined in our discussions, because we realize that we need to be—our time together is so valuable.”

How do you wrap up your meetings and ensure accountability for identified next steps?

“Our last agenda item is wrap-up and next steps,” the chief of staff said. “The team confirms the plan, then the meeting’s facilitator sends a follow-up email after the meeting to confirm what was discussed and individuals’ roles. The facilitator is also responsible for getting updates from team members on the items they are responsible for.

“The beginning of the next meeting always focuses on those follow-up items—‘Hey, these were the 3-5 things that came out of the last meeting that we wanted to make sure were complete by now. How did that go?’ This is a way to ensure accountability, but it’s also an easy, quick way to celebrate success and acknowledge the things we have accomplished.”

The Jewish Federation of Greater Atlanta has developed a template for tracking follow-up items. (See the toolkit online at www.bridgespan.org/special-collections/executive-team-effectiveness-toolkit.) “Our chief of staff also tracks and records follow-up items during meetings and sends reminders to ensure that everyone who said they would do something at a previous meeting actually completes their tasks. We then start our next meeting by asking about where we are with those items,” CEO Robbins said.