

# Successful Meetings: It's All About the Follow-up

Frustrated by meetings that are run well but produce limited results? Then try keeping an eye on what happens afterwards.

BY LISA PELTIER

**H**ow do you define a successful meeting? Many focus on the meeting itself and place their time and attention on activities that occur before and during a meeting, such as appropriate preparation and organization, effective facilitation, decision-making, and gaining consensus. These elements are necessary for a successful meeting; however, one of the most important criteria for defining a great meeting is what happens afterward. While a meeting facilitator may plan and execute the meeting well, effective follow-up is essential to achieve meaningful action and a positive outcome. This article outlines specific meeting follow-up items and provides tips on how to implement the suggested action items.

## TIPS FOR SUCCESSFUL FOLLOW-UP

Putting additional focus on what occurs after meetings will help facilitators achieve greater outcomes in the form of tangible results. Post-meeting elements and activities to focus on include:

**Meeting recap.** Prior to the close of each meeting, the facilitator should:

- Summarize key take-aways and action items.
- Identify those individuals who will manage each activity.
- Establish expectations regarding timelines for completion of each task, and make sure you receive buy-in from the participants that the dates are realistic.

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**Meeting minutes.** Make sure someone is responsible for taking notes during the meeting. The practice can rotate responsibility or have a dedicated staff member assigned to take the minutes. When assigning this task, it's important to make sure the individual understands what is expected, listens carefully during the meeting, accurately records the discussion and decisions that have been made, and prepares a timely recap of the meeting for all participants.

Minutes should include the meeting date and location, names of participants, key discussion items and decisions made, individuals responsible for follow-up actions and by what date, as well as open items for subsequent meetings. Organize the minutes in the same sequence as the meeting agenda. Minutes should be circulated to attendees, managers and physicians who need to be informed. Distribute the minutes within 24 to 48 hours after the meeting.

**Action plan.** This document, one of the most important follow-up tools, is a roadmap that identifies the action items to be completed. The plan should include names of indi-

viduals responsible for each item, a description of work to be done, timelines for completion, and a place to enter status updates. Items should be prioritized with the most urgent or short-term projects at the top and long-term projects at the bottom. Update the plan regularly and use it as a communication tool for physicians, managers, and staff to report on their progress.

The most efficient way to circulate the action plan is via email. When doing so, the subject line of the email should indicate “updated action plan, (date)” so the recipient knows the document includes information about new activity on work projects.

**Status updates.** Check with people periodically about the status of their commitments. People often need a gentle reminder about completing an action item, which can help them avoid embarrassment and the risk of needing to tell their peers at the next meeting that they could not accomplish their commitments.

**Communication.** Clear, concise, and consistent communication to management and staff demonstrates that progress is being made and helps build trust and confidence. For major projects and initiatives, provide a weekly update in the form of a brief email or written memo with bullet points that clearly describe the activities that took place during the week. On a monthly basis (or more frequently), update the action plan and circulate it to physicians, managers, and staff.

**Progress reports.** A week before the next meeting, ask each responsible party to prepare a progress report. Depending on time allocations and importance of the project or activity, these reports can be provided in written form (i.e., the updated action plan) or as a verbal update during the meeting.

**Achievement celebrations.** Take time to acknowledge employee contributions and thank those who helped make the achievements happen. Even a simple acknowledgment will motivate people, create engagement, and demonstrate your appreciation.

## ONGOING PROCESS

Improving the quality and effectiveness of business meetings takes work and is an ongoing process. Periodically evaluate the outcome of your meetings and ask, “How can we improve our process and make our follow-through more



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effective?” In most cases, the desired results will be achieved when meeting follow-up occurs.

## IT WORKS FOR US

It’s exciting for me to watch how this process has evolved in our own organization. New managers are learning the art of effective meeting management and follow-up from our more experienced managers. They feel the excitement and positive outcome of meetings that are facilitated well and are able to replicate this in their own meetings, and in some cases improve the process. As a result, they are more engaged, take ownership, and feel a sense of pride when communicating the outcome of activities they have completed. ■

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