TOOL · MEETINGS

LEAD A MEETING

Most meetings go sideways before they start: no clear objective, and a room full of people waiting to hear what the leader thinks. Plan with purpose, open with clarity, and draw the best thinking out of the whole team.

01 PLAN — Set one clear objective.

02 OPEN — Name why everyone is here.

03 WORK — Draw out the room.

04 CLOSE — Decide and communicate.

THE COLLECTIVE GENIUS OF THE ROOM

The best idea in the room rarely belongs to one person. It gets built when people feel safe to offer half-formed thoughts and the group shapes them together. Your job isn't to have the answer. It's to create the conditions where the answer can emerge.

KNOW WHAT EACH ITEM IS

label every agenda item before the meeting

TYPE	WHAT IT IS	HOW TO LEAD IT
decide	A choice the group needs to make today.	Name who makes the call and how: consensus, vote, or the leader decides after hearing everyone.
solve	A problem that needs the group's best thinking.	Define the problem first. Agree on what's true before jumping to solutions.
discuss	An open question. No decision is expected yet.	Say so out loud, so people can think freely without pressure to land it.
inform	Updates people need to know.	Send ahead in writing when you can. Keep it under five minutes in the room.

HOW TO USE THIS TOOL

01 **Page 2, before:** plan the meeting and set the objective.

02 **Page 3, the first five minutes:** script how you'll open.

03 **Page 4, during:** moves and questions that draw out the best ideas.

04 **Page 5, the last ten minutes:** capture decisions, next steps, and who communicates what.

BEFORE THE MEETING

PLAN IT

If you can't write the objective in one sentence, you're not ready to call the meeting.

MEETING

DATE AND TIME

LENGTH

THE OBJECTIVE

By the end of this meeting, we will ...

THIS MEETING IS MAINLY TO (SELECT ONE)

- ☐ make a decision
- ☐ solve a problem
- ☐ generate ideas
- ☐ align and inform

THE PEOPLE

WHO NEEDS TO BE IN THE ROOM, AND WHY

WHO JUST NEEDS AN UPDATE AFTERWARD

THE AGENDA

decide, solve, and discuss items first; inform items last or in writing

	ITEM	TYPE	OWNER	MINUTES
01		select		
02		select		
03		select		
04		select		
05		select		

BEFORE YOU SEND THE INVITE

- ☐ The objective and agenda go out at least 24 hours ahead.
- ☐ Any pre-read is attached, so the meeting time goes to thinking, not reading.
- ☐ For each decision, I know who makes the call and how.

THE FIRST FIVE MINUTES

OPEN IT

The first five minutes set the tone for everything after. Write your opening in your own words.

01 why we're here

State the objective plainly.

"We're here to decide how we'll staff the new location. By the time we leave, we'll have a plan we all own."

02 why it matters

Connect it to the bigger picture with a win, a story, or the customers it serves.

"Last month we picked up 40 new customers. This is about making sure they stay."

03 what's on the table

Name the problem to solve, the decisions to make, and the items to discuss.

"Two decisions today, one open discussion, and a quick update at the end."

04 how we'll work together

Invite honesty and tell them how decisions will be made.

"I need your honest thinking, especially if you see it differently. I'll share my view last."

GROUND RULES WORTH SAYING OUT LOUD

- ☐ Every voice matters here.
- ☐ Half-formed thoughts are welcome.
- ☐ Disagree with ideas, not people.
- ☐ What's said here stays here.

DURING THE MEETING

DRAW OUT THE ROOM

An open environment doesn't happen by accident. These moves make it safe to share and help the group shape good ideas into great ones.

FIVE LEADER MOVES

01 **Speak last.** Once the leader shares an opinion, most people stop offering theirs. Ask first, then add yours.

02 **Write before you talk.** Give everyone two minutes to write ideas silently before anyone speaks. Quiet thinkers get a voice.

03 **Separate creating from critiquing.** Collect every idea first. Evaluate only after all of them are on the table.

04 **Invite the quiet and the dissenting voice.** "We haven't heard from you yet." "Who sees this differently?" Then thank them for it.

05 **Build, don't knock down.** Ask "What would make this idea better?" before "What's wrong with it?"

SHAPE IDEAS THROUGH DIALOGUE

move the group through four stages, in order

01
GO WIDE

Get every idea on the table.

"What are all the ways we could do this?"

"What would we try if we couldn't fail?"

02
DIG IN

Understand before judging.

"Say more about that."

"What's behind that idea?"

"Who could build on this?"

03
NARROW

Test against what matters.

"Which of these best serves our mission and our customers?"

"What does it cost us?"

"What are we missing?"

04
COMMIT

Land it and own it.

"What are we deciding?"

"Can everyone support this, even if it wasn't your first choice?"

WORDS THAT OPEN THE ROOM, AND WORDS THAT CLOSE IT

SAY THIS	INSTEAD OF THIS
"What are we missing?"	"That won't work."
"Help me understand your thinking."	"We tried that already."
"That's a different angle. Keep going."	"Let's not go there."
"What would make this better?"	"I think we all agree, so ..."

THE LAST TEN MINUTES

CLOSE IT

A meeting isn't over until everyone knows what was decided, who's doing what, and who's telling whom.

DECISIONS WE MADE

	DECISION	WHO DECIDED, AND HOW
01		
02		
03		

WHO COMMUNICATES WHAT, TO WHOM, BY WHEN

	WHAT	WHO TELLS THEM	TO WHOM	BY WHEN
01				
02				
03				

NEXT STEPS

	ACTION	OWNER	DUE
01			
02			
03			

MEETING PULSE

rate 1–5 right after, or ask the team to

	1	2	3	4	5
We met our objective.	☐	☐	☐	☐	☐
Everyone had a real chance to speak.	☐	☐	☐	☐	☐
The best idea won, not the loudest voice.	☐	☐	☐	☐	☐
We know who does what next.	☐	☐	☐	☐	☐