

MEETING EFFECTIVENESS OPTIMIZER

Purpose

Transform time-wasters into productive sessions that respect everyone's time and energy.

Instructions

Use this worksheet to design or revamp a specific recurring meeting.

Part 1: Meeting Purpose Assessment

Meeting name: _____

Current frequency and duration: _____

Purpose Clarity

What is this meeting intended to accomplish?

Which of these purposes does this meeting serve? (Check all that apply)

- ☐ Information sharing
- ☐ Coordination and alignment
- ☐ Problem-solving and decisions
- ☐ Brainstorming and ideation
- ☐ Relationship building
- ☐ Learning and development
- ☐ Status updates
- ☐ Other: _____

Could this purpose be achieved without a meeting? ☐ Yes ☐ No ☐ Partially

If yes or partially, what alternatives could work?

Value Evaluation

What specific value does this meeting create?

What would happen if this meeting didn't occur?

How does this meeting support team/organizational goals?

Part 2: Participant Analysis

List all current participants and analyze their involvement:

Participant	Role in Meeting	Contribution	Value Received	Attendance Needed?
				<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Sometimes
				<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Sometimes
				<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Sometimes
				<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Sometimes
				<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Sometimes

				<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Sometimes
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Are any essential perspectives or roles missing? If so, who?

Could any participants benefit from an alternative to full attendance?

- Read summary notes: _____
- Attend only relevant portions: _____
- Rotate attendance: _____
- Send representative: _____

Part 3: Content and Format Optimization

Timing Optimization

Ideal frequency:

Ideal duration:

Best time of day/week:

Rationale for these choices:

Agenda Design

Standing agenda items:

1. _____
2. _____

3. _____
4. _____

For each agenda item:

- Specific purpose: _____
- Time allocation: _____
- Preparation needed: _____
- Desired outcome: _____

Process for adding/removing agenda items:

Format Choices

Meeting type that best serves the purpose:

- ☐ In-person
- ☐ Video conference
- ☐ Phone/audio only
- ☐ Hybrid
- ☐ Asynchronous discussion

Physical/virtual setup needed:

Tools or materials required:

Part 4: Meeting Protocols

Pre-Meeting Expectations

Materials to be distributed in advance:

Required preparation from participants:

Communication about agenda and goals:

During-Meeting Norms

Discussion facilitation approach:

Decision-making process:

Documentation method:

Technology and device guidelines:

Post-Meeting Practices

Action item tracking:

Notes distribution:

Follow-up communication:

Part 5: Energy Management

How will this meeting support participants' energy?

Meeting pacing strategy:

Engagement techniques:

Break structure for longer meetings:

Approach for managing low-energy periods:

Part 6: Effectiveness Measurement

How will you know if this meeting is successful?

Observable outcomes to track:

Participant feedback methods:

Regular review process:

Part 7: Implementation Plan

Current vs. Optimized Meeting Comparison

Aspect	Current Approach	Optimized Approach	Rationale for Change
Purpose			
Participants			
Frequency			
Duration			
Format			
Agenda			
Protocols			

Change Management

How will you introduce these changes?

How will you address potential resistance?

Timeline for implementation:

Part 8: Continuous Improvement

Schedule for reviewing meeting effectiveness:

Metrics to evaluate:

Process for ongoing refinement:

Additional Context:

Effective meetings share several key characteristics:

- **Clear purpose** that couldn't be accomplished through other means
- **Right participants** who need to be there and contribute meaningfully
- **Thoughtful structure** that supports the intended outcomes
- **Active facilitation** that keeps discussion productive and inclusive
- **Appropriate energy management** that respects human attention spans
- **Actionable outcomes** that move work forward
- **Continuous improvement** based on regular feedback

Remember that the most valuable meeting improvements often come from what you eliminate rather than what you add. Reducing frequency, shortening duration, decreasing participant count, and removing unnecessary agenda items frequently yield the greatest returns.

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