

Essential Skills for Effective Meetings

A research-backed, heart-centered course teaching the 6 Core Competencies for Effective Meetings.

After completing this course, you'll know how to confidently design and lead successful meetings that people want to attend.



About this Course

Keep meetings short, always use an agenda, stand up, take notes on paper – and hop on one leg while you're at it! There's no shortage of advice about meetings out there, but what really matters?

Over the past decade, the team at Lucid Meetings has worked with thousands of organizations to help them run more successful meetings. We've seen what it looks like when teams meet well, and the critical mistakes most teams make that keep their meetings from achieving that same level of success.

This course will introduce you to the science and practice of effective team meetings.

We've learned that teams need to develop these Core Competencies in order to run consistently high-performing meetings.

The Core Competencies of High-Performing Meetings

Everyone who meets in your organization needs to learn these effective habits.

1. Know the meeting's purpose and desired outcomes.
2. Structure meetings to achieve the desired outcomes.
3. Respect the time invested.
4. Structure meetings for engagement.
5. Take visible notes.
6. Publish meeting records where everyone can find them.

Your Goals for this Course

What are your goals for this course?

What change in your team, your organization, and/or your career do you want this course to help you make?

Take a moment to write down your goals below.

My goals for this course are:

At the end of each lecture, return here and reconnect with your goals. Consider how each of the core competencies can be used to achieve your goals.

The Learning Compact

As the Course Instructor, I commit to providing a structured, engaging, learning opportunity. I will work to keep the sessions fun, fast, and productive. More importantly, I will make sure that if you invest the time to do the work outlined in this course, you will have tangible tools and new skills that you can put to use in your day-to-day work.

Your Course Instructor is: J. Elise Keith

Signature: _____



The Meeting School team recognizes that, despite our fervent hopes and valiant efforts, we cannot guarantee that you'll learn anything. Ultimately, responsibility for the effectiveness of your learning belongs to YOU.

This compact recognizes the important truth that, although we can get people to sign up for a course, we cannot make them learn what they need to know.

We invite and encourage you to take responsibility for your learning.

As a Course Participant, I commit to asking questions when I have them, to working through the exercises, and to practice what I learn with my colleagues. I commit to giving these meeting practices a fair try going forward. I am ready for a career full of awesome meetings, and will do the work required to get there.

Your Signature: _____



How to Get the Most from this Course

The content in this course is the equivalent of attending an intensive 2-day workshop or a single-term continuing education course. All the material is on-demand, which means you could watch all the video lectures and read through the workbook in a single long day. I don't recommend this approach, however, because this won't give you time to complete the exercises provided with each section or practice any of the skills you're learning.

To get the best results, I recommend taking these steps.

1. Put class time on your calendar.

Reserve the time you need for completing this course. Treat this just like you would a live, in-person course by creating a class schedule on your calendar. I recommend scheduling your lessons anywhere from 3 to 7 days apart.

The table shows how long you'll need to watch the videos, take the quizzes, and complete the activities in each section. For example, creating this schedule is one of your activities for the first section.

Then, identify the meetings on your calendar where you'll apply these skills.

Section	Recommended Time
Introduction: Good Meeting, Bad Meeting, and Getting Started	45 minutes
Core Competency 1. Know the meeting's purpose and desired outcomes.	45 minutes
Core Competency 2. Structure meetings to achieve the desired outcomes.	1 hour
Core Competency 3. Respect the time invested.	1.5 hours
Core Competency 4. Structure meetings for engagement.	1 hour
Core Competency 5. Take visible notes.	1 hour
Core Competency 6. Publish meeting records where everyone can find them.	15 minutes
Putting It All Together and Putting It To Work	3 hours

2. Practice. Create habit triggers so you remember to practice.

Most of us run meetings out of habit. This course will ask you to develop new habits. Creating habit cues, or triggers, will help you remember the new habit you want to develop. For example, the conference rooms at Intel Corporation have posters displaying their meeting rules, triggering everyone to practice the meeting habits they expect.

Read about other ways to set habit triggers here: <https://jamesclear.com/habit-triggers>

3. Reflect on your experience.

Complete the short questionnaire at the end of each section asking you to comment on what you've learned. When you take the time to reflect about what you've learned in writing, research shows this dramatically increases your ability to retain and use this information. Reflecting in writing burns the information deeper into your brain.

4. Teach others.

Share what you're learning with your colleagues. I recommend presenting your final project to your team, and sharing with them what you learned that helped you complete that project. This will force you to learn the material more thoroughly, so you're ready to answer their questions. Also, since you never meet alone, this will increase the number of people in the room working to make your meeting a success.

No one meets alone. You don't have to learn to meet alone either.

There are several ways you can interact with your instructor, the Lucid Meetings team, and other students throughout the course.

Add comments below the lectures.

Below each lecture, you can see comments added by other students, reply to comments, and add new comments of your own. Your instructor sees every comment, so this is a good place to ask questions and share examples that could be useful to other students too.

Join the online discussion community.

Once you complete the first two sections, you'll see a form to join the Lucid online community. There you can chat in real-time with Meeting School instructors, students from this and other classes, and other people working to make meetings and the world a better place. The Lucid community also gets first access to new content and exclusive live events.

Enroll your team and study together.

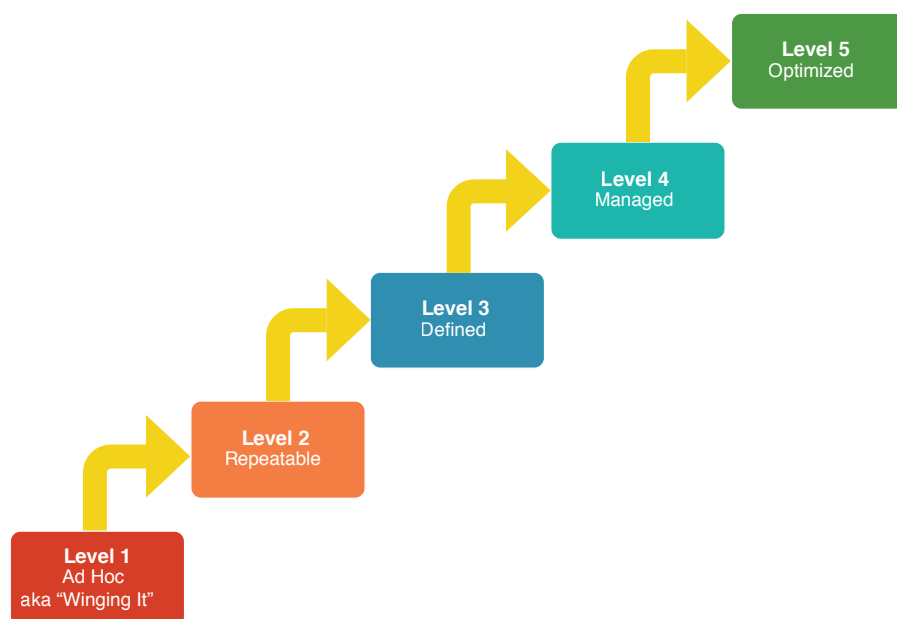
Teams of five or more people save when enrolling together. How cool would it be if everyone in your group knew how to run a great meeting?

After This Course

Essential Skills for Effective Meetings is the foundational course in the Lucid Meetings series on Mastering High-Performance Meetings. This series includes courses for business leaders and professionals who want to get the most from the day-to-day business meetings in their organizations.

Other Courses Launching in 2019

- How to Encourage Participation, Discourage Dysfunction, and Increase Engagement in Meetings
- Reliable Patterns for Success: Mastering the 16 Types of Business Meetings That Work
- How to Design the High-Performance Meetings that Drive Your Culture



The Meeting Performance Maturity Model. Most organizations operate at Level 1.

Good Meeting, Bad Meeting

Simple tools for immediately improving
any meeting starting today.



Meeting Readiness Checklist

Are you ready to meet? If you can answer “Yes!” to each question below, you’re good to go! If not, be a time-saving hero and cancel that meeting!

1

The meeting has a purpose.

No? Cancel it!

2

You know the desired outcomes.

No? Cancel it!

3

You have a plan.

No? Cancel it!

4

Everyone is prepared.

No? Cancel it!

5

Necessary people showed up.

No? Cancel it!

Activity: Readiness Check for Your Next Three Meetings

Fill out the tables below with details for each of your next three meetings.

Meeting Name:

PURPOSE	
DESIRED OUTCOMES	
PLAN OR AGENDA	
REQUIRED PREPARATION	
REQUIRED PARTICIPANTS	

Meeting Name:

PURPOSE	
DESIRED OUTCOMES	
PLAN OR AGENDA	
REQUIRED PREPARATION	
REQUIRED PARTICIPANTS	

Meeting Name:

PURPOSE	
DESIRED OUTCOMES	
PLAN OR AGENDA	
REQUIRED PREPARATION	
REQUIRED PARTICIPANTS	

Your Notes

[illegible]