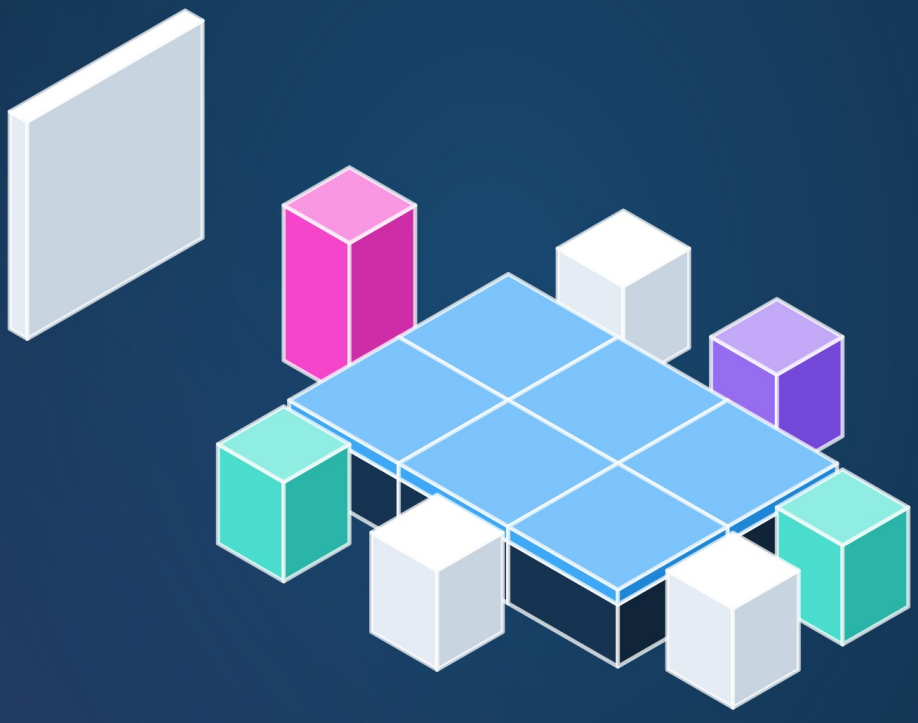
OPERATIONS INSIDER

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# MEETINGS AND FACILITATION QUICK START CHECKLIST

Score the recurring rounds of one area in one hour, with agendas and records you can point at.



**COUNT. CUT. LEAD. FOLLOW THROUGH.**

START HERE

# How to Use This Check

One area and its recurring rounds, one hour with the person who owns them, twenty-five statements, one number.

| 01 LOOK | 02 SCORE | 03 ACT |
|---|---|---|
| Open the calendars of the area, the last three agendas, the last three records and the open task list. Score what exists, not what is intended. | Score each statement from 0 to 4. Without an agenda, a record or a task list you can point at, the score is 2 or lower. | Pick the weakest block and agree one action with an owner and a date before you leave the room. |

## The Scoring Scale

| POINTS | MEANING |
|---|---|
| 0 | Not in place. |
| 1 | Happens occasionally, depends on individuals. |
| 2 | Partly in place, not consistent across rounds or areas. |
| 3 | Mostly in place and visible in the records. |
| 4 | Consistently in place, visible, reviewed and improved. |

> **WHY MEETINGS ARE WORTH AN HOUR OF YOUR TIME**
>
> **A plant of 280 people spent 5,874 participant hours a year in 16 recurring rounds, EUR 375,936 of salaried time. Nobody had ever added it up, because every single round looked small.**

## Before You Start

- **Scope:** one area, one plant or one project, and every round that repeats in it.
- **Evidence:** invitations with an agenda, the last records, the open task list, the calendars of three people.
- **Tone:** you check the rounds, not the people in them. Ask what a round decides, not who talks too much.

THE CHECK

## 01 The Meeting Landscape

| NO. | CHECK | SCORE 0 TO 4 |
|---|---|---|
| 01 | A register lists every recurring round of the area with purpose, owner, frequency, length and the people who attend. | |
| 02 | The cost of each recurring round per year is calculated from length, number of participants and an agreed hourly rate. | |
| 03 | Every recurring round has one written purpose and one named owner who is allowed to change or cancel it. | |
| 04 | Rounds that overlap in people and in content were merged or canceled in the last twelve months by a written decision. | |
| 05 | The register is reviewed at least once a year, and every round has to earn its place again. | |

## 02 Preparation

| NO. | CHECK | SCORE 0 TO 4 |
|---|---|---|
| 06 | Every round states in writing what it is for and what has to be finished when it ends. | |
| 07 | The agenda gives each item a time, an owner and a type: information, discussion or decision. | |
| 08 | Material that has to be read is sent at least 24 hours before the round, and nothing is presented that people could have read. | |
| 09 | The people invited are the ones who decide, contribute or are directly affected, and everyone else gets the record instead of a chair. | |
| 10 | A decision item names the question, the options and the person who decides before the round starts. | |

THE CHECK

## 03 Running the Meeting

| NO. | CHECK | SCORE 0 TO 4 |
|---|---|---|
| 11 | Rounds start and end at the agreed time, and nothing is repeated for latecomers. | |
| 12 | One person leads the round, holds the agenda and the time, and everyone knows before the round who that is. | |
| 13 | Points that leave the agenda go to a visible parking lot with an owner instead of taking the time of the next item. | |
| 14 | Every decision is said out loud, written down and read back before the group moves on. | |
| 15 | Every task leaves the round with one owner and one date, never with a department or with "we". | |

## 04 Facilitation and Participation

| NO. | CHECK | SCORE 0 TO 4 |
|---|---|---|
| 16 | The leader uses methods that collect before they judge: silent writing, a round of the table or a short poll. | |
| 17 | Frequent speakers are held to their share and quiet participants are asked directly, as a routine and not as a rescue. | |
| 18 | Disagreement is worked on the facts: the question is restated, the figures are named, and an open point is parked with an owner and a date. | |
| 19 | The group knows how each kind of decision is made: by the decider after advice, by consent, or by a vote with a stated rule. | |
| 20 | A round can be led by someone other than the most senior person present, and that is accepted. | |

THE CHECK

## 05 Record, Follow-Through and Rhythm

| NO. | CHECK | SCORE 0 TO 4 |
|---|---|---|
| 21 | The record of a round fits on one page: decisions, the reason in one line, tasks with owner and date, parked points. | |
| 22 | One task list carries over between rounds, and open tasks are read at the start of the next one. | |
| 23 | The share of tasks closed by their date is measured and shown to the people who sit in the round. | |
| 24 | Participants rate their recurring rounds at least twice a year on purpose, preparation, time and outcome, and the result leads to a change. | |
| 25 | A written rule set says what each round decides, how long it takes, who attends and how the record is kept, and new rounds follow it. | |

## Your Result

| BLOCK | POINTS | OUT OF |
|---|---|---|
| **01 The Meeting Landscape** | | 20 |
| **02 Preparation** | | 20 |
| **03 Running the Meeting** | | 20 |
| **04 Facilitation and Participation** | | 20 |
| **05 Record, Follow-Through and Rhythm** | | 20 |
| **TOTAL** | | 100 |

YOUR RESULT

# Read the Number

The total tells you how much of your meeting time is habit. The weakest block tells you where to start.

| TOTAL | WHAT IT MEANS | WHAT TO DO FIRST |
|---|---|---|
| **0 to 39** | Unmeasured. Rounds exist because they have always existed, and nobody knows what they cost. | Build the register. Count hours and cost per round. |
| **40 to 59** | Counted. The landscape is known, but single rounds run on habit. | Cut and merge. Give every round a purpose, an owner and a timed agenda. |
| **60 to 79** | Organized. Agendas and records exist, follow-through is uneven. | Hold the time, record decisions, close tasks by their date. |
| **80 to 100** | Effective. Rounds decide, tasks close and the landscape is pruned once a year. | Keep the rule set. Train the people who lead the rounds. |

## Your Three Priorities

| NO. | WHAT TO IMPROVE | FIRST ACTION | OWNER | DUE |
|---|---|---|---|---|
| | | | | |
| | | | | |
| | | | | |

THE RULE FOR EVERY ACTION

**Owner and date, or it did not happen. Repeat the check after three months and compare the blocks, not the feeling.**

## What to Do Next

| NEXT STEP | WHAT YOU GET |
|---|---|
| **MEETINGS STARTER KIT** | The guide for the first 30 days: the register with its cost, the cut and merge decisions, one pilot round rebuilt, plus the Excel planner with landscape, agenda and task list. |
| **MEETINGS EXCELLENCE BUNDLE** | The full playbook, a two-day workshop pack, six templates, the Excel system with charter, roles, rating, load, business case, key figures and audit, and a workshop deck. |

Both are available at operationsinsider.com.