

The Happy Meeting Checklist

A FEW RULES FOR BETTER WORKING SESSIONS

“Every well-organized meeting is organized in its own way, but all ineffective meetings are alike.”
A pastiche of a famous novel’s opening line



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Complaining about having too many useless meetings is a classic of managerial life. Even though videoconferencing has changed some habits, the verdict remains the same: across eras, countries, and companies, meetings are often seen as time-consuming and unproductive. Especially other people’s meetings. While everyone can eloquently describe the pointless sessions they endure, few of us admit our own share of responsibility. I’ve heard countless laments about bad meetings—but very rarely have I heard someone confess to having organized one and promise to do better next time. Are we better judges of others than of ourselves? In an effort to improve, let me take the first step: yes, I have initiated ineffective meetings on my colleagues. Organizing a good working session is trickier than it seems. A checklist can help do it right.

Every well-organized meeting is organized in its own way

No two meetings are alike. A short weekly check-in is not a deep-dive workshop. A start-up is not a public administration. Mexico is not Japan. Twelve participants create different dynamics than three. Introductions are necessary when people don’t know each other. An information session is not a decision-making committee.

There are many variables that explain why good meetings are hard to organize—it depends heavily on context. It might be tempting to say there are no universal rules. And indeed, most training sessions on the subject are limited, caricatured, or simplistic.

All bad meetings are alike

It’s probably easier to describe the anatomy of a bad meeting. Here’s what I’ve experienced—obviously long ago, in my youth, and never again.

A tumble of issues: unclear objectives, too many or the wrong participants, logistical problems (no room, no sound, wrong videolink), late start, overrun schedule, inaccurate supporting documents, lack of preparation, one person monopolizing the floor, passive-aggressive exchanges, awkward silences, long off-topic detours, or an ending without next steps. Everyone has their own horror stories to add.

The Good Meeting Checklist

Let’s now try to outline what makes for a happy meeting. Like happy families, they might share a few traits. Each point below may seem trivial, but together they matter. One failure can ruin the whole experience. That’s the challenge: the devil is in the details.

1. Organize only essential meetings

- ☑ The meeting has a clear, written objective.
- ☑ The objective cannot be achieved without a meeting.
- ☑ The objective was communicated in advance.
- ☑ The meeting has an inviting, meaningful title.
- ☑ The duration fits the goal (sometimes 15 minutes is enough).

2. Invite the right people

- ☑ All necessary participants are included.
- ☑ Only the necessary participants are included.
- ☑ Key participants have accepted the invitation.

3. Ensure flawless logistics

- ☑ The meeting room is available and nearby.
- ☑ The room is comfortable and well arranged.
- ☑ It contains what’s needed: tables, chairs, whiteboard, screen, computer, sound, microphone, drinks, snacks, etc.
- ☑ For remote meetings, the invite includes the correct video link.
- ☑ Logistics have been double-checked.

4. Use a useful document

- ☑ There’s a discussion support (or a good reason not to have one).
- ☑ The document is concise, well written, clear, and relevant.
- ☑ It includes objectives, agenda, context, facts, questions, and next steps.
- ☑ It was shared in advance.

5. Assign clear roles

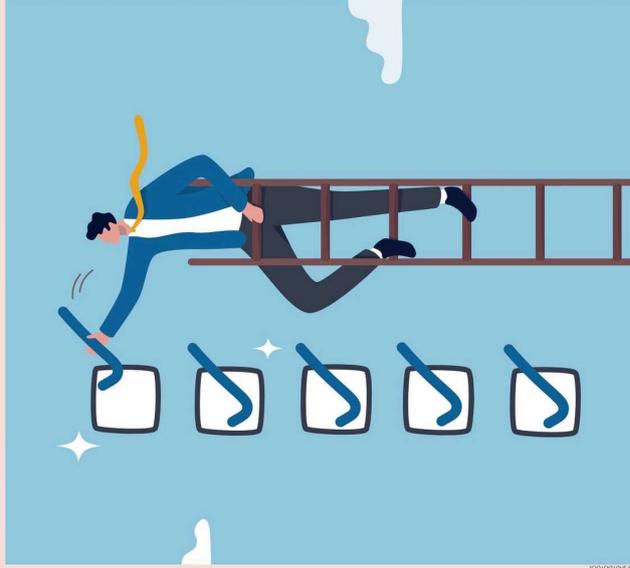
- ☑ The organizer is by default the meeting leader.
- ☑ Only one person leads the meeting (except in special cases).
- ☑ Roles are defined: who opens, who concludes, etc.
- ☑ Participants know who’s who (or are introduced).
- ☑ Experts can join at a specific time and leave afterward.

6. Own the leader’s role (or delegate effectively)

- ☑ The leader arrives early to welcome participants.
- ☑ If late, they warn others (though it shouldn’t happen).
- ☑ They present a clear written agenda at the start.
- ☑ The agenda follows a proven structure.
- ☑ They keep the meeting on track and refocus discussions.
- ☑ They ensure proper follow-up afterward.

7. Run the meeting efficiently

- ☑ The chosen day and time make sense (Tuesday 10 a.m. ≠ Friday 7 p.m.).
- ☑ Start on time.
- ☑ Begin with an inspiring introduction reminding everyone why they’re here.



☑ Ensure logical transitions between topics.
- ☑ End gracefully.
- ☑ Finish five minutes early.

8. Follow up properly

- ☑ Share the key document used during the meeting.
- ☑ Send a written summary of decisions and next steps.
- ☑ Assign tasks only to people who were present.
- ☑ Set a date and time for the next meeting, if relevant.

9. Be ready to improvise

- ☑ I’ve planned for things not to go as planned.
- ☑ The effort spent on preparation matches the importance of the meeting.
- ☑ (Thankfully, not every meeting requires answering all of the above questions!)

Adapt this checklist to your context. It’s probably too detailed for an informal chat, but not detailed enough for a 200-person conference. Skip what doesn’t apply, and add what does. Then all that remains is to wish you all the happiness in meetings. ■