

The Seven-Step Meeting Process¹

The Seven-Step Meeting Process is a defined meeting process that standardizes the method of conducting a meeting and assists in the effective execution of critical meeting tasks. Not only do these seven steps help in structuring a meeting, they also help teams review and assess their efficiency and productivity.

Step 1 Clarify Objectives

Ensure that all understand and are in agreement with the meeting objectives.

Step 2 Review Roles

Review who will be timekeeper, recorder, leader, and facilitator. Decide at what intervals feedback on time will be given.

Step 3 Review Agenda

Review details of agenda items listed under step 4. Ensure that all team members understand and are in agreement with the agenda items.

Step 4 Work Through Agenda Items

Step 5 Review Meeting Record

Review the flipchart record on the walls but do not read all charts. Look for changes and additions. Decide which charts should be kept and which should be discarded.

Step 6 Plan Next Steps and Next Meeting Agenda

Decide who will do what before the next meeting. Decide what the objectives and agenda items will be for the next meeting.

Step 7 Evaluate Meeting

What did the team do well that it should continue doing? What could the team do differently to improve the meeting, group, and continual improvement processes?

¹ Hyer, K., Flaherty, E., Fairchild, S., Bottrell, M., Mezey, M., Fulmer, T., et al. (Eds.). (2003). *Geriatric Interdisciplinary Team Training: The GITT Kit* (2nd ed.). New York: John A. Hartford Foundation, Inc.