

Conducting Functional Meetings Playbook

Introduction

Meetings are essential for collaboration, decision-making, and driving progress—but only when they are structured with purpose and efficiency. Too often, meetings become time-wasting, unclear, or unproductive. This playbook ensures that every meeting is **focused, values-driven, and outcome-oriented**, enabling leaders and teams to engage meaningfully while maintaining accountability and care.

1. Defining the Purpose of a Meeting

Before scheduling a meeting, ask:

- **Is a meeting necessary?** Could this be an email, shared document, or quick check-in?
- **What is the outcome we need?** Define a clear goal for every meeting.
- **Who needs to be involved?** Only include those directly contributing to the discussion or decision.

If the purpose is unclear or there is no actionable outcome, reconsider holding the meeting.

2. Setting the Rules of Engagement

Establish shared expectations using the [Rules of Engagement Resource](#) before your first meeting. These include:

- **Aligning meetings with organisational values**
- **Rotating roles** (facilitator, timekeeper, minute-keeper)
- **Psychological safety** (every voice is valued, constructive dialogue encouraged)
- **Clarity in communication and follow-through**

All participants should agree to uphold these rules to create an inclusive and accountable meeting environment.

3. Structuring a Functional Meeting

Every meeting follows a simple yet effective structure:

1. **Opening Check-in**
 - a. Quick team pulse (e.g., two-word check-in, progress updates)
 - b. Confirm meeting objectives and agenda
 2. **Core Discussion**
 - a. Time-boxed agenda items with assigned leads
 - b. Use the **Dial Method** to balance care (ensuring engagement) and accountability (sticking to outcomes)
 - c. Encourage solution-focused conversations
 3. **Closing & Next Steps**
 - a. Recap decisions and assign action items
 - b. Confirm accountability (who does what, by when?)
 - c. Discuss follow-up integration into ongoing work
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4. Making Meetings More Inclusive & Efficient

- **Rotate roles** each meeting to share responsibility and ensure diverse contributions.
 - **Use an active shared agenda** where team members can add topics, mark completed tasks, and track progress.
 - **Stick to time limits** and prioritize critical discussions.
 - **Encourage intentional listening** to keep conversations focused and productive.
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5. Driving Accountability & Follow-Through

- **Use a shared document** to capture action items in real-time, with clear owners and deadlines.
 - **Track open items** in the next meeting to maintain momentum and accountability.
 - **Close feedback loops** by ensuring that decisions are implemented and reviewed.
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6. When to Cancel or Adapt a Meeting

Not every scheduled meeting should happen! Ask:

- Has the agenda changed significantly? If yes, update or cancel.
- Have major decisions already been made? If yes, shift to an asynchronous update.
- Are key participants unavailable? If yes, reschedule or adjust expectations.

Be intentional—meetings should add value, not be routine obligations.

7. Meeting Templates & Tools

We invite you to **make** the time to build these templates that fit your purpose. They can be simple and usable by every team member.

- **Functional Meeting Agenda Template:** A customisable template for teams to build their own meeting structure, ensuring alignment with their values and objectives.
- **Accountability Tracker:** A shared document where team members log tasks, set deadlines, and track progress collaboratively.
- **Two-Word Check-in Process:** A quick way to gauge team engagement. We have one you can use already – [find HERE](#)

Final Thought


Meetings should be a space for **alignment, progress, and decision-making—not a drain on time and energy**. By applying this playbook, your team will create a meeting culture that is **purposeful, engaging, and results-driven (and fun too!!)**.

Take action: Share this playbook with your team and commit to running better meetings starting today!

At Well-Led Workplaces, we're here to help you lead with clarity and purpose. Let's create workplaces where people and results thrive—together.

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