## Designing Effective Meetings Using Insights from the Five Paths to Leadership

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<table>
<thead>
<tr>
<th>Warrior</th>
<th>Relator</th>
<th>Critical Thinker</th>
<th>Visionary</th>
<th>Sage</th>
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</thead>
<tbody>
<tr>
<td>Have a clear purpose for the meeting: are we sharing information? Making decisions? Who makes what decision? Try to limit loose ends.</td>
<td>How will you build community and connection in your meetings? What is the level of trust and safety among the participants? Focus on inclusive participation.</td>
<td>What prep work will be needed? How will the time be structured? Is everyone clear on their role/contribution to the meeting?</td>
<td>Ensure space for big picture discussion and be clear about the end goals. Limit criticism. Use the “yes and” technique as a way of building on ideas.</td>
<td>Evaluate your meetings every quarter: how effective are they? Do people feel involved? What do they like? Dislike? Suggestions/advice</td>
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Suggestions for meeting design:
As you read through the suggestion below, remember that not all meetings in a repeating series need to follow the same structure. Some meetings could include time to build connection and psychological safety, while other meetings could include time for divergent thinking and brainstorming. Ask yourself, “what is the goal for this meeting?” with both a long and short-term mindset.

1. Create an agenda that begins with the purpose of the meeting, and then outlines what will happen, with approximate times for each portion. Consider writing the items as questions or at least clarity regarding why it is on the agenda beyond the topic (to discuss, to decide, something else?). Be thinking about the agenda as a tool for people to prepare for the meeting: What is expected from them? What should they expect from the meeting?

2. Send the agenda out ahead of time (3-7 days, depending on the context) so participants can be prepared (e.g.: Critical Thinker).

3. Include some way for the participants to connect with one another. This could be the first 5 minutes of the meeting (e.g.: Rose, Thorn, Bud; or “what is one word or phrase you are holding?” etc.), or it could be a larger part of the meeting if the team is still getting to know each and creating psychological safety together. Include this in the agenda so folks can opt in or out as appropriate (e.g.: Relator).

4. Ensure there is clarity regarding who is: a) facilitating the meeting, and ensuring inclusive and equitable participation, b) keeping time, c) taking notes, d) creating action items, e) clarifying what will happen after the meeting, etc. (e.g.: Critical Thinker & Warrior).

5. Ensure that some meeting time (if not every meeting, during some meetings) includes space for big picture discussion and idea generation (with criticism limited), ideally focused on a specific goal or outcome. Let ideas flow at these meeting, as opposed to shutting them down too quickly (e.g.: Visionary).

6. Get feedback from the participants about how the meeting is working for them at sensible intervals, and make changes as needed to ensure participants can engage fully (e.g.: Sage).