Cobalt Strategic Meeting Worksheet

Establishing Objectives

A strategic meeting is very much a microcosm of establishing a strategy for a function, and many of the same concepts apply.

Have a Vision

This may never be voiced during the meeting, but can be exceedingly helpful when planning. When we leave this room in (hours/days) we will _____.

- *Be clear in our roles and responsibilities, as well as the implementation timeline for the rollout of our new enterprise management system.*
- *Be prepared for a flu epidemic in our community.*
- *Have five innovative ideas for our continuous improvement initiative.*

Be SMART

Applying the SMART pressure test for meeting objectives is the way to challenge your strategic planning for the meeting, but more importantly it will set you and the participants up for success. Ask yourself, are the objectives ...

Specific | *If anyone were to read the objective, would it be clear what needs to be done and expressed as plainly as possible?*

Measurable | *And when we say measurable, plan on measuring at the conclusion of your meeting, either with your participants during the conclusion or as part of a debrief.*

Attainable | *A reality-check moment: are the people in the room capable of delivering what needs to be done with the information/resources they have at their disposal? Stretch goals are great ... but don't rely on people behaving in ways they never have before (unless part of the meeting is training them how to think/act differently).*

Results-focused | *What does successfully achieving the objective mean for those involved? In short, this is why this meeting/event is worth the investment of people's time, money, effort.*

Time-bound | *Remember, the time you are bound to is the length of your event. Can you realistically achieve what you set out to do in the time you have to do it?*

Know What Comes Next (and Who Is Responsible for What)

How many great ideas were forgotten because meeting participants (or organizers) returned to their desks and their day-to-day mindset? When you achieve your objectives for the meeting, have a clear action plan on how the work that took place is going to be applied.

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