QuickTip – Effective Meeting Closure and Follow-up

"A common problem in many meetings is lack of closure. Lots of things are discussed, but there is no clear path forward." Ingrid Bens, Facilitation at a Glance, p. 58

When to Use

Closure and follow-up are necessary for every meeting that must produce results or cause action.

Procedure

Address the following four elements at the end of every meeting or facilitated session. To ensure there is enough time in the meeting, it is good practice to reserve time on the agenda for closure. Short and simple meetings may need only few minutes for closure, while significant time on the agenda may be needed to wrap up a complex facilitated session.

Review accomplishments	• Summarize decisions • Verify action items, including owners and target dates
Look toward the future	• Summarize next steps • Agree on follow-up methods (how, who and when) • Verify next meeting time, location, and participants • Gather future agenda topics
Find dispositions for what was not completed	• Agenda items that were not reached • Items in parking lot • Issues raised but not resolved
Wrap up	• Photograph or transcribe flipcharts, whiteboard and notes • Evaluate the session (e.g. survey, written evaluations, or plus / delta) • Thank everyone!

Considerations

Go beyond good meeting closure. Make sure to follow up after the meeting. Here are three excellent practices for meeting follow-up.

Synergy Professional Services, LLC
11330 SW Foothill Drive, Portland, OR 97225
Contact: Jeff Oltmann, jeff@spspro.com
www.spspro.com, (503) 644-6433

Promptly send a written summary	Be concise	Monitor action items
• Within 1 business day of meeting if possible. • Favor speed over extensive reporting	• Minimum: decision log, action item (AI) log, and next meeting info • Full minutes only in special circumstances • Make it easy: record AIs, decisions, and notes on agenda	• Post AIs visually, such as RYG dashboard • Check status regularly, especially for upcoming due dates • Schedule reviews and problem-solving sessions as needed

1. When following up, it's better to be fast than fastidious. This is one place where finely ground details are not useful. Email a summary within 1 business day after the meeting to everyone who was invited. Use a concise style – such as short and bulleted. Be sure to include decisions, action items, and information about the next meeting.
2. To make your follow-up more efficient, it's a good idea to spend about 10% of your meeting time on closure. As you summarize action items, decisions, and next steps with your team, type them into the appropriate log, list, or agenda template for quick distribution.
3. Verify the next meeting (time, location, and attendance), and add this to your meeting summary. If you document the key items during the meeting, then you can quickly send a summary. And attendees can review while the meeting is still fresh in their memories.
4. After the meeting is over, follow up periodically, especially on action items that are coming due soon. If things are not coming to timely closure, invite the appropriate people to a problem-solving session or review to help them move forward.

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