



Meeting Portfolio Assessment

One way to being to assess your meeting practices is to list all the meetings you currently have within the full portfolio.

- Ask another team member to complete columns #1-5 to the best of their ability, if possible.
- That provides you an opportunity to review the information in columns #1-5 with fresh eyes and revise, if needed.
- It also enables you to spend your time on the two columns that can provide the greatest insight #6-7.
- Consider how you want to engage your team, individually and/or collectively, in this process.
- Look at it through the lens of achieving the best work and balancing three factors important to effective work:
 - Preserve Energy and Focus
 - Coordinate and Collaborate Effectively
 - Prioritize Relationships
- Finally, and most importantly, what action will you take as a result?

1.	2.	3.	4.	5.	6.	7.
MEETING	OBJECTIVE	FREQUENCY	DURATION	PARTICIPANTS	GRADE	RATIONALE FOR THE GRADE
List each meeting you have in one of the rows below e.g. Full staff; XYZ project, etc.	Articulate the purpose of each succinctly. What are you seeking to achieve?	For example: Monthly, Quarterly As needed	The typical amount of time you set for the meeting	The name of the group or, for a project related meeting, the name of the individuals	What grade would you give to this meeting in terms of the ROI you get for the time spent? What grade would the participants give?	What are the key reasons the particular grade(s) are given

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