1. Before the First Meeting

Leaders play critical roles in ensuring their team works well together and the research outcomes meet participants’ expectations. The first and most important role is work done well in advance.

Leaders lay the foundation

- Share key documents and preliminary plans with the team well before the first meeting
- Create a shared virtual environment for document sharing and communicating
- Reach out individually to each team member to build rapport and understand their perspectives
- Ask team members share something virtually about themselves with the team
- Ask team members to think about what they view as the most important aspects of the project
- Find a venue for the in-person meetings that is away from everyone’s work place
- Plan for at least a 3-day first meeting and consider travel time carefully – meetings that start or end mid-day often have participants arriving or leaving early

Develop a goals-based agenda

- Develop an agenda that builds incrementally session by session, day by day
- Identify specific goals for every session. Remember a goal doesn’t just have to be to “produce” something specific but could instead be develop a shared understanding/familiarity or build team culture.
- Balance goal orientation with the need for flexibility
- Include social activities throughout the meeting days such as coffee breaks, happy hours, and shared meals
- Consider including a ~15 min morning and afternoon email/phone break (not part of coffee break) encouraging members to actively engage with the team all other times
- Circulate a draft agenda 4–6 weeks before the meeting to seek agenda input from the team and ask each member to identify several sessions they would be willing in co-facilitate
- Circulate final agenda at least 2-3 weeks before the meeting

Taking the pre-meeting planning process seriously helps avoid significant problems down the road.