How to Set a Formal Business Agenda

Though you may have many impromptu meetings at your small business, you should have formal meetings as well. These meetings cover important matters that require the undivided attention of employees. In order to maintain focus and signal to attendees that the meeting should be taken seriously, you must create a formal agenda. Pass out your formal agenda at the beginning of the meeting and follow it as you conduct the meeting.

Let everyone know your agenda is planned for a specific purpose.

1

Place a heading on the agenda. This should include the company name and the department name. Next, type the date and time of the meeting. This indicates the meeting agenda will be kept on file to show the issue discussed was addressed at a specific point in your company's history.

2

Describe the meeting. Give the topic of the meeting under the heading "Type of Meeting." This should be a single sentence giving a general indication of what the meeting is about. Including this section will help attendees focus on the matter at hand.

3

Name the meeting facilitator. This is important because it shows that you or the person you have designated take responsibility for the smooth functioning of the meeting. With repetition of these types of meetings, attendees will recognize that they are expected to grant authority to the facilitator and follow the lead of that person in terms of procedure.

4

List invitees. This is not the same as attendees. Make a list of all people who are expected to come to the meeting. This official record will show your attempt to include all significant personnel.

5

Type "Call to Order" on your agenda page. This indicates the official opening of the meeting. If you simply state verbally that, "the meeting has been called to order," you will let your staff know it is time to stop chatting and focus.

6

Indicate that roll call will be taken. This is a simple attendance notation. Mark down who is absent rather than who attended. This will signal to employees that they are expected to attend a formal meeting. Typing "Roll Call" will be sufficient to cover this procedure.

7

Approve the minutes of the last meeting. Briefly go over what happened at the last meeting, using a typed account. You should assign someone to keep the minutes at each meeting. This document can be a list of bullet points. Ask the current attendees to vote on approving the minutes after they are read aloud.

8

Discuss open issues. This is the period where attendees update everyone at the meeting about ongoing issues. Encourage a discussion about further action that must be taken on open issues. Your agenda should name the specific open issues you would like to address.

9

Address new business. List new business on the agenda in two or three bullet points. This is the heart of the meeting, and you should allow the most time for addressing this section of the agenda in the meeting. You are the one who selects the new business, because this is the reason for the meeting.

10

Adjourn the meeting. Indicate on your agenda that you will officially close the meeting at the end of the discussion of new business. While this may seem like a mere formality, it is a way to say, "Get back to work."

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