The FewerFasterBolder Super Clear Meeting Invitation Template

Hello, hello,

Here’s the clearest, simplest way to get everyone on the same page – crucially *before* a meeting.

Differences in expectations are much harder to deal with once you’re in the meeting. This template helps you get clear together with time to refine or adjust if you need.

Sometimes, it’s most helpful if you agree *together* all the elements of scope. It’s an engagement and alignment exercise in its own right. Sometimes, you need to set the scope yourself and then use the invitation to check if others agree. You’ll need to make a judgment call on where to land on this spectrum. The pr-invite is a good way to gather thoughts before you write the invitation and an example is included.

You don’t need to use every element of the invitation template. And of course, you can add more. Just use it as a springboard.

Let’s get meetings working for you.

With my best wishes,

Carrie

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[Follow me on LinkedIn for inspiration](https://www.linkedin.com/in/carriebedingfield/), tools and templates for collaborative meetings

**The invitation template**

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| --- | --- |
| To: | [Those meaningfully affected / with expertise] |
| Subject line | Invitation: Meeting name |
| Body of email | [greeting]The purpose of this meeting is to ...As you know, this project is about ...Questions we’ll tackle in this session include…I’d love you to …In this session, we’ll decide … by …We will…But we won’t…How does this sound?Come ready to…Links that might help you prepare: this document, that document and this website.[sign off] |

**IDEAS: consultative invitation wording**

“I’m proposing this as a plan for the meeting - how does that sound?”

 “Have I understood what we’d like to get out of this session?”

“Does anyone have thoughts on how we might tackle this meeting?”

**EXAMPLE: a meeting invitation for help two teams work better together**

Hi everyone,

The purpose of this session is to explore how we can make it easy to work together on Project X and contribute more to break even this year.

In this session, we’ll explore together:

1. What would easy look like?
2. How does each time prefer to work?
3. What changes would make it easier to work together?

We will:

* Explore how we’d ideally like to collaborate
* Better understand each team’s approach
* Agree helpful and obvious changes

But we won’t:

* Address every issue in this session

How does that sound?

So that we have the most helpful conversation, could you all make some notes on the best opportunities for making it easy to work together. Be as specific as possible and come ready to share your points.

Best regards, Sandhya

**THE PR-INVITE: to help you align with people before the invitation goes out**

We’re planning a meeting to [explore/decide/better understand/address/look at/align ourselves on] X.

Your thoughts on the following would be warmly welcomed (choose 2-3 questions that are most helpful for your meeting?).

* What questions should we be addressing?
* What should we be walking out of that meeting with?
* What is best possible use of our time?
* What *shouldn’t* we do in that session?
* What do we need to bring with us / prepare / come ready to talk about?
* Who should absolutely come to this session?

**LANGUAGE**

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| --- | --- | --- |
| **Avoid vague and unclear words**that mean different things to different people like:DiscussTalk aboutCover**Instead, use clear, active verbs** that define the session, like:ExploreGet your insights onProblem solveUnderstandGet clear onShare information onEvaluate options for Decide (if that’s what you really mean) |  | **Use overly formal words with caution**like:MinutesChairAgenda… and even meeting (consider “session”)**Instead, consider less formal words** like:Decisions and actionsSession leaderSession plan |