

Meeting Decision Matrix: When to Meet & How

The Meeting Decision Matrix is a strategic framework designed to eliminate unnecessary meetings and optimize those that are truly essential. By following this structured approach, leaders can reclaim valuable time for themselves and their teams while ensuring that necessary collaboration happens in the most effective format. In an era of meeting overload, this tool empowers leaders to make intentional decisions about when, how, and with whom to meet.

Author

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Goal

This tool helps leaders determine whether a meeting is necessary, select the optimal format when meetings are required, and ensure only essential participants are included—ultimately improving team productivity, decision quality, and employee satisfaction.

Advice

For maximum impact, follow these practices when using the Meeting Decision Matrix:

1. **Be ruthlessly honest** when answering the necessity assessment questions—defaulting to "no meeting" unless clearly justified
2. **Share this matrix team-wide** to establish common expectations and language around meeting decisions
3. **Review recurring meetings quarterly** using this framework to eliminate or redesign those that no longer serve their purpose
4. **Celebrate meeting reductions** to reinforce the value of strategic meeting management
5. **Coach others** on using this tool when you receive unnecessary meeting invitations



Step 1: Meeting Necessity Assessment

Answer these questions honestly before scheduling:

Question	Yes	No
Can this information be shared via email/document? Consider asynchronous communication Continue to next question	Consider asynchronous communication	Continue to next question
Is real-time discussion or collaboration needed?	Continue to next question	Use alternative communication
Does this require collective intelligence or diverse perspectives?	Meeting likely needed	Continue to next question
Is relationship-building or emotional connection an objective?	Meeting likely needed	Continue to next question
Is this a high-stakes strategic conversation?	Meeting likely needed	Consider alternative communication



Step 2: Format Selection Guide

If a meeting is necessary, determine the optimal format.

Meeting Purpose	Best Format	Typical Duration	Key Success Factors
Information Sharing	Structured presentation with Q&A time	30 min or less	Clear presentation, time for questions
Problem Solving	Collaborative workshop	60-90 min	Defined problem, structured activities
Decision Making	Discussion with clear decision process	45-60 min	Decision criteria, options prepared in advance
Creative Ideation	Interactive brainstorming	60-90 min	Psychological safety, creative techniques
Planning	Structured Workshop	60-120 min	Clear objectives, relevant stakeholders
Team Building	Interactive Experience	60-120 min	Engaging activities, psychological safety
Status Update	Brief stand-up or round-robin	15-30 min	Time limits, focus on blockers

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Step 3: Participant Selection Criteria

Ensure the right people are in the room:

- Decision Makers: Those authorized to make final decisions
- Subject Matter Experts: Those with specialized knowledge
- Implementers: Those who will execute the outcomes
- Stakeholders: Those directly affected by decisions
- Diverse Perspectives: Those who bring different viewpoints

Remember: Every unnecessary participant multiplies meeting inefficiency

When NOT to Schedule a Meeting:

- Information can be shared via documentation
- No clear desired outcome exists
- A single person could handle the task
- The discussion repeats previous meetings
- Required participants cannot attend
- No one has prepared adequately