1.6 Agenda Documents

Create structured records of subjects you want to discuss with others.

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Sometimes, it's hard to remember what you wanted to discuss with people. This applies to coworkers, significant others, friends, family members, or even service providers. Agenda documents provide a written record of subjects you'd like to talk about. They give you a document you can easily refer to during a planned or spontaneous meeting to ensure that you remember what you'd like to discuss.

Another advantage of agenda documents is that you can edit them when it might be inefficient or inappropriate to break up the flow of an existing conversation. You can simply make a quick note and return to the discussion. Most of us live busy lives and find it hard to make the time for topics we care about. Agenda documents can help bridge this barrier.

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- Provides a space for collecting both big ideas and small, yet important details.
- Helps you stay focused and calm, knowing you have made a note of key concepts and will come back to them.
- When you use agenda documents with your teams, everyone involved will know what they missed during meetings.

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- Might require buy-in from other people you want to use them with, especially if you decide to make the documents shared and collaborative.
- In certain situations, especially non-work scenarios, using agenda documents could feel artificial.

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Fundamentally, an agenda document is any list of items you want to discuss with someone. Each time a new topic pops into your head, and you know you'd like to discuss it at some point, add another item to the list. Whenever you have an uninterrupted conversation with the person in question, simply open the document. Everything you want to talk about will be listed in front of you.

If you prefer, you can make agenda documents shared so that others can add and edit items. In these circumstances, cloud-based note-taking apps, such as Google Docs, are very useful. Another option is to keep them in a dedicated WhatsApp group where everyone is notified whenever an item is added. The important factor is to reach an agreement about a tool that works for everyone. Or, failing that, agree that each person will use their own preferred method and bring their own list to the meeting.

There are two types of agenda documents:

1. Live agenda doc. To create a live agenda doc, simply add items as they arise, then remove them once they're discussed. As items are cleared, these documents empty out, showing you what

remains to be discussed.
2. Rolling agenda doc. A rolling agenda document includes a "next meeting" section at the top of the document where you add relevant items. After each meeting, note the current date, process these agenda items, and open a new section for the upcoming meeting, making it easy to add new items. This kind of document is often valuable for team meetings, as it both captures the history of your discussions and allows for conversations about fresh topics. You can share the document with team members, inviting everyone to add topics that need to be discussed at the next meeting, along with their names so everyone knows who wants to discuss which subject.

Agenda documents can be useful not only in business contexts but also in personal ones. However, understand that the idea of creating an agenda for personal relationships can generate resistance. Some people will immediately recognize that it's a method of staying synchronized and maximizing the quality of your conversations, whereas others will push back on the basis that it lacks spontaneity and feels emotionally cold to bring an agenda to personal conversations.

Depending on the context, it might be best to have an honest conversation on why you want to try this tool, and then agree on a way of doing it that's comfortable for the other person. For example, you might try keeping your agenda document separately and referring to it before meeting the other person but not looking at it openly while you're together.