

# EMERGE

with RUBIN

## **Classroom Activity: How to Recap a Conference Call or Team Meeting**

After a conference call or team meeting, it's important to summarize any next steps so each so the project stays on track.

### **Instructions:**

#### **Step 1**

Follow the template for how to recap the team on a big project on pages 2-3 below from the book, *Wait, How Do I Lead My Team?* Incorporate the details relevant to your own situation.

#### **Step 2**

Read your email(s) out loud to make sure there are no typos or awkward phrases.

#### **Step 3**

Be ready to share your work with the group.

From Chapter 4 of *Wait, How Do I Promote My Business?*

### **How to recap a conference call or office meeting**

After a phone call or meeting, what's the best way to organize the information and present it to the group via email? Again, brevity and highlighting win the day.

#### **Subject line: Recap of [conference call/meeting/phone call] on [month and day]**

Hi everyone,

Thanks for your time [on the call/in the video chat/at the meeting].

[Use this space to give everyone a short summary of the meeting; for instance, "Quick recap of the meeting: The design phase of the construction project is on track, and now we need to turn our attention to the actual build."]

These are the action items [over the next few days/over the next week/moving forward]:

- [Then, list out each update or action item as a bullet point. Let people absorb every piece of information one at a time so nothing is lost in a big paragraph. Also, add a space between each bullet so they're not crammed together.]
- [Whenever possible, call people out by name and put the name in yellow highlight. That way, the person will see what he/she needs to do.]
- [For instance, "**Malcolm** will talk with the general contractor about his timeline and the materials needed for the brick courtyard."]
- ["**Heather** said she can create the flyer to alert all the neighbors about upcoming construction."]
- ["**Dan** and **Beth** will both work with city officials and the traffic engineer to secure the area for construction."]
- ["**Esther**, can you send everyone the Excel document with the real estate estimates?"]

Thanks, and let's keep pushing to get the project done.

– Your first name

Email signature

## **Deeper Insight**

Send the recap email within two to four hours of the conference call or meeting so the information is fresh in your mind. You will also keep the momentum rolling on the given project.