

After the Meeting

The protocol lead provides a recap of the meeting and next steps.

1. Distribute Notes From the Protocol Process

Consolidate notes, recommendations, and any action items from the meeting.

The notetaker or support staff could have this responsibility. Once they format the notes into an electronic document (e.g., transcribed from chart paper or edited if typed and projected) and the key meeting planners (e.g., protocol lead, facilitator) have reviewed the notes, send the notes to participants along with other post meeting communication.

This communication also allows the protocol lead to ensure that any participants responsible for follow-up actions have a copy of the work they agreed to do. Usually, the protocol lead can accomplish this by sending email to stakeholders, but some ongoing data groups establish wiki pages or other online methods for posting meeting minutes and updates.

2. Confirm Next Steps and Timelines

Conduct follow-up and debrief with relevant individuals.

Those who planned and conducted the data meeting (e.g., protocol lead, meeting facilitator, other key staff) should discuss observations from the meeting and follow-up actions that require additional work. This conversation allows for clarification of roles and responsibilities moving forward, as well as any leadership decisions or actions the group identified. If you scheduled additional meetings, contact those people who have assigned tasks in advance of the next meeting to remind them and check on their progress.

You can use the [Follow-up Checklist](#) to document this part of the process and make notes of any additional actions. This is an important opportunity to share information from the meeting:

- meeting notes;
- plus/delta reflections (+/Δ);
- facilitator observations; and
- next steps outside of the meeting, which include
 - clarifying and agreeing on action items, including whether the group needs additional meetings or follow-up;
 - confirming persons responsible and timelines; and
 - discussing any plans that require leadership decisions or actions so the facilitator can report back to the group.