

Should You Call That Meeting?

An interactive course on meeting decisions — built to be worked through, not just read. Drag the sliders, answer the questions, check off the list.

About This PDF

This document is a linear, accessible companion to the interactive web version of this course. Interactive elements (sliders, quizzes, click-through activities) are described in italics where they appear, so the content and logic of each activity comes through even without the interactive experience.

Course Intro

Meetings are one of the most common — and most misused — tools in the workplace, whether they happen around a table or over video. Think about the last meeting you attended that could have been a three-sentence email. This course covers **how to determine when a meeting is the right call, how to plan it, and what to do when it isn't necessary**. You will also learn **how to protect your calendar from unproductive incoming invitations**.

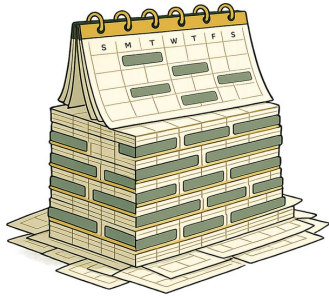


Course Objectives

By the end of this course, you will be able to:

- 1 Calculate the total annual cost (in time) of a recurring meeting based on its length and frequency using the Meeting Multiplier tool
- 2 Analyze how a rescheduled meeting can create a conflict on someone else's calendar
- 3 Apply the three-question test to determine whether a workplace situation requires a meeting or a message
- 4 Categorize a meeting's purpose into its correct meeting type — Status Update, Decision, Brainstorm, or 1:1
- 5 Evaluate real scenarios and decide whether the right call was a meeting or a message
- 6 Choose the appropriate response strategy to decline an unnecessary or conflicting meeting invitation while maintaining professional relationships
- 7 Utilize the pre-meeting checklist to verify that a proposed meeting meets all five criteria before sending the invitation

Lesson 01 — The Meeting Multiplier



A single meeting rarely happens just once. See what it adds up to once it becomes **a recurring meeting — scheduled to repeat on a regular basis**. Depending on your calendar tool, you might see this called "recurring" (Outlook) or "repeat" (Google Calendar) — same idea, different name.

In the activity below, use the slider to set the meeting length — how long the meeting runs, and use the dropdown to select how often it repeats. As you adjust each one, watch the total number of hours change to show how much time a recurring meeting adds up to over a year.

OVER ONE YEAR, THIS MEETING ADDS UP TO

26 hours

That's about two full workdays.

MEETING LENGTH (MINUTES)

30

HOW OFTEN

Weekly

[Interactive element — described for accessibility]: The Meeting Multiplier lets a learner set a meeting's length (15–120 minutes) and frequency (weekly, biweekly, monthly, or daily). As those two variables are adjusted, the total annual hours that meeting adds up to are displayed with a relatable comparison (for example, "that's about two full workdays").

Lesson 02 — The Interruption Chain

Once you've decided a meeting is worth having, watch your buffer time when scheduling it: **leave enough time between meetings — do not schedule meetings back-to-back**. If the meeting right before yours runs long, you will be forced to reschedule — and create a conflict for someone who already planned their calendar around your meeting.



Creating Conflicts for Others

Rescheduling one meeting can sometimes trigger a chain of events. You've seen this happen — one meeting runs long, and suddenly other meetings need to shift too — and someone else usually pays for it.

Click through the scenario below for an example of how rescheduling a meeting can affect someone else.

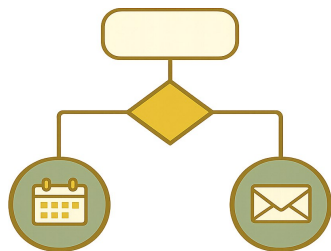
- Your 2:00 pm client call runs long and doesn't end until 2:45.
- You need to bump your 2:30 team meeting to 3:00 — this is the only slot that works for everyone except Maria. She has it blocked-off for focus time.
- Maria was using that block to finish a deck due at 4:00. As a result, she's rushing to complete it.
- The rushed deck goes out with an error. Now Maria has to schedule a follow-up call to fix it.

The takeaway: None of this had to happen. Leave room between meetings when you can. Back-to-back scheduling means one delay doesn't just cost you time — it costs someone else theirs too.

Reset

[Interactive element — described for accessibility]: The Interruption Chain reveals four connected steps one at a time as the learner clicks through: (1) Your 2:00 pm client call runs long and doesn't end until 2:45. (2) You need to bump your 2:30 team meeting to 3:00 — this is the only slot that works for everyone except Maria. She has it blocked-off for focus time. (3) Maria was using that block to finish a deck due at 4:00. As a result, she's rushing to complete it. (4) The rushed deck goes out with an error. Now Maria has to schedule a follow-up call to fix it. A closing takeaway then appears: None of this had to happen. Leave room between meetings when you can. Back-to-back scheduling means one delay doesn't just cost you time — it costs someone else theirs too.

Lesson 03 — Meeting, or Message?



Now let's determine whether you should **set a meeting or send a message**.

In the activity below, you will be asked three questions. Your answers will help you figure out if a meeting is necessary, so answer honestly.

NOTE: If you are new to terms like **“quick sync”** or **“async”** — check the **Key Terms below**. You may find that most “quick syncs” don’t actually need to be a meeting at all — they just feel like they do.

Does this require live back-and-forth discussion, not just a status check?

Do you need buy-in or a decision from more than one person right now?

Would waiting for async replies meaningfully delay something urgent?

[Interactive element — described for accessibility]: A branching decision quiz asks three yes/no questions in sequence: (1) Does this require live (real-time) back-and-forth discussion, not just a status check? If no → Send a message. If there's no real-time discussion needed, a written update covers it — and gives everyone a record to refer back to. If yes → continue to: (2) Do you need buy-in or a decision from more than one person right now? If no → Send a message. One-way information doesn't need a room full of people to receive it in real time. If yes → continue to: (3) Would waiting for async replies meaningfully delay something urgent? If yes → Call a meeting. Live discussion, multiple decision-makers, and real urgency — this is exactly what a meeting is for. If no → Try async first. Post the question in writing with a deadline for replies. Send a follow-up/reminder 2 days before the deadline. If they don't respond, call a meeting. Typically, people will start replying to avoid the meeting.

Key Terms

Quick Sync: A brief, informal meeting (usually 10–15 minutes) used to align a team or gather updates fast. They are often called on reflex with a simple, *“Let's hop on a quick call.”* Don't let the word “quick” fool you: a 15-minute sync with five people actually burns 75 minutes of collective company time, and it forces everyone to break their focus to show up live. While these meetings sound harmless, they're often scheduled out of habit without anyone asking if a live discussion is truly necessary.

Sync (Real-time): A live interaction where participants respond in the exact same moment, such as during a face-to-face meeting or a phone call.

Async (No real-time meeting): Send an email, leave comments on a shared document, or post a Teams message. Recipients review and reply on their own schedule or by a specified due date, with no expectation of an immediate response.

Broadcast: A one-way message sent to a group, such as a company announcement. No live or immediate reply is expected from the recipients.

Lesson 04 — Meeting Types at a Glance

So you've passed the meeting-or-message test and decided you need to call a meeting. But **what kind of meeting?** Not every meeting has the same purpose, audience structure, duration and frequency.

Review the table below to see what each meeting type requires, so you don't end up with a brainstorm that runs like a status update (or vice versa).

Meeting Type	Purpose	Audience — Who's in the Room	Duration & Frequency
 Status Update	To share progress, spot project roadblocks early, and make sure everyone is on the same page.	The core project team and any cross-functional partners.	15–30 mins Weekly or bi-weekly NOTE: If discussion is not needed, cancel the upcoming recurring meeting and send an email.
 Decision	To review/evaluate available options, specific proposals requiring approval, debate risks, and walk away with a final choice and clear next steps on a specific project or strategy.	Key decision-makers, stakeholders, and project owners who can make decisions and provide a formal sign-off.	30–60 mins As needed per milestone
 Brainstorm	To rapidly generate as many creative ideas and new solutions as possible for a specific problem or project.	The project team, guests from other teams for fresh views, and a facilitator.	45–90 mins At project kickoffs or pivots
 1:1 (Coaching & Feedback)	To help team members grow, give honest feedback, and build a stronger working relationship.	A manager and their direct report.	30–50 mins Weekly or bi-weekly

Lesson 05 — Scenario Practice

Now that you've learned about the different meeting types, let's see if you can make the right call **to determine if a meeting is needed or not**.

In the activity below, you will be asked three questions. Select the best response that describes what you would do in that situation.

Scenario A

Your team missed a deadline. Leadership wants to know why. Do you...

Incorrect: Call an all-hands meeting to explain.

Worth reconsidering — At this time a meeting is not needed. Leadership asked you why the deadline was missed. You can email a written summary first. Leadership can later decide if a team meeting is necessary.

Correct: Send a written root-cause summary, offer a call only if questions come up.

Right call — this doesn't need a real-time discussion, just a clear explanation in writing, with a call held in reserve if questions come up.



Scenario B

Three stakeholders disagree on which vendor to choose, and the deadline is Friday. Do you...

Correct: Call a 30-minute decision meeting with only the three stakeholders.

Right call — a real disagreement with a hard deadline needs a live discussion, and only the three stakeholders need to be in the meeting since they are the decision makers.

Incorrect: Loop in the whole department for visibility.

Worth reconsidering — while this needs a meeting for a live discussion, looping in the whole department adds people who are not decision makers.



Scenario C

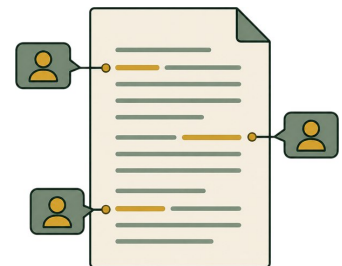
You want feedback on a doc, and everyone's schedule is packed this week. Do you...

Incorrect: Push for a meeting slot anyway, it's easier to explain live.

Worth reconsidering — no meeting is necessary; feedback on a document can be shared by email with a due date for feedback, especially since everyone's calendar is already packed.

Correct: Share the doc with inline comments and an async deadline for feedback.

Right call — this is a perfect example of async: everyone can respond in writing on their own time, or by a specific due date — no meeting is required.



Lesson 06 — How to Decline a Meeting (Politely)

We've all been there — your calendar is already packed, and another invite pops up that doesn't really require your presence. Instead of just hitting “decline” or ignoring it, here are some examples you can use when you want **to politely decline an invitation**:



The Situation	How to Reply
You aren't sure you're needed	"I don't think I'm essential for this one, but I'm happy to review the notes afterward if anything needs my input. Feel free to reach out if you need me sooner."
The topic could be handled over chat/email	"Could we try this as a written thread first? If we hit a wall (blocker), I'm glad to hop on a call."
Your calendar is completely packed	"I can't make this time work without dropping something else — could we handle my part over email, or is there a recording or notes I could review instead?"
You're double-booked with a higher priority	"I have a scheduling conflict that I can't move, but I want to make sure I don't hold things up. Can you send over the agenda? I can email you my updates before the meeting starts."
The meeting lacks a clear agenda	"I want to make sure I'm fully prepared for this. Do we have an agenda or a specific goal yet? I just want to make sure I'm the best person to add value to the conversation, or if I should loop someone else in."

What Would You Do?

Imagine you just received an invite for a big brainstorm session. Looking at the attendee list, most of your team is going, and the topic is focused on a project you aren't involved in. Your afternoon is also swamped with a major deadline for your own work. **How would you politely decline this meeting invitation?**

Select the best response that keeps your afternoon free without appearing disengaged (checked out).

Incorrect: "I can't make this time work without dropping something else — could we handle my part over email, or is there a recording or notes I could review instead?"

Close, but this makes it sound like a pure scheduling issue. Since you aren't on the project and your team has it covered, you can bow out completely rather than trying to reschedule.

Correct: "I don't think I'm essential for this one — happy to review notes after if anything needs my input. Feel free to loop me back in if that changes."

Spot on. This recognizes that you aren't needed for this specific topic, trusts the team to handle it, and protects your time for your own deadline.

Incorrect: "Could we try this as a written thread first? If we hit a wall, I'm glad to hop on a call."

Not quite. Suggesting the entire group switch to a written thread for a project you aren't even working on is overstepping.

Ultimately, declining a meeting isn't about dodging work — it's about making sure you have the uninterrupted time to actually get your most important tasks done.

Lesson 07 — Before You Hit Send



Once you've decided a meeting is necessary, review this checklist before sending the invite.

☒ **Define one clear outcome**

Ensure the session focuses strictly on a single, required deliverable that demands real-time group discussion.

☒ **Streamline the attendee list**

Invite only the individuals essential to reaching that outcome. Avoid adding people "just in case."

☒ **Distribute an advance agenda**

Send a clear agenda ahead of time, even if it is only a single line.

☒ **Share context early**

Provide all pre-reading materials and necessary background information well in advance.

☒ **Keep it short**

Schedule the session for the shortest timeframe realistically needed to accomplish the goal.

Course Wrap-Up

Meetings serve a purpose but they also cost time and energy, so they shouldn't be your automatic go-to. Before you hit "send" on that next calendar invite, pause for a second and think about what you actually need to accomplish and if there is an easier way to get it done.



When you aren't sure, just ask yourself: **Do we need to talk this out live — in a meeting, or is it just an FYI update?** If there's a genuine blocker that needs to be discussed, call a meeting. If it's just information that needs to be shared, send it in writing.

Let's review what we covered in this module.

Now that you've completed this module, you have the tools to evaluate when a meeting is necessary and when a message is the better call.

You have learned to:

- 1 Calculate the total annual cost (in time) of a recurring meeting based on its length and frequency using the Meeting Multiplier tool
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Resources

[Before You Hit Send Decision Guide \(PDF\)](#)

Download a quick guide on when to meet, what to write instead of meeting, and how to decline. PDF | 5 KB