

12/17/2013



CRASH COURSE TO PLANNING EFFECTIVE MEETINGS



Gutierrez Consulting | By Stacey Gutierrez



CONTENTS

Should you meet?	2
Purpose	3
Priorities	3
Outcomes	4
Sequence	4
Timing	5
Attendees	5
Agenda	6
Date	11
Time	11
Venue	11

It is not uncommon for employees and management to hold a negative attitude towards planning and attending meetings. “Useless”, “frustrating”, “unproductive”, and “waste of time” are key words that are often associated with meetings. Meetings are a necessary part of business, but there are helpful guidelines for preparing for effective meetings. This handout will be your guide through identifying ways to plan for an effective meeting(s).



What makes for an ineffective meeting?

SHOULD YOU MEET?

Question	Yes	No
1. Can you state the purpose of your meeting?		
2. Is your meeting purpose worth the time and cost of participant’s?		
3. Will meeting be more efficient and produce better results than sending an email or making phone calls?		
4. Do you really want and/or need the input from participants?		
5. Are you truly going to act on participant input?		
6. Do you have the information you need to meet productively?		
7. Will you and the participants have enough time to prepare for the meeting?		
8. Are the participants going to be able to work together on the issue(s) necessitating the meeting?		

PURPOSE

Meetings come in all shapes and sizes, and for lots of purposes.

The purpose of a meeting is to leverage the most cognitive and creative capabilities of the individuals in the room to accomplish goals.

Below are some examples:

- Giving information
- Training
- Discussion (leading to an objective)
- Generating ideas
- Planning
- Workshops
- Consulting and getting feedback
- Finding solutions/solving problems
- Crisis management
- Performance/reporting/assessment
- Setting targets and objectives
- Setting tasks and delegating
- Making decisions
- Conveying/clarifying policy issues
- Team building
- Motivating
- Special subjects-guest speakers
- Inter-departmental-process improvement.

PRIORITIES, OUTCOMES, SEQUENCE, TIMINGS, AGENDA, DATE, TIME, VENUE

The acronym **POSTAD TV** helps remember how to plan effective meetings, and particularly how to construct the meeting agenda, and then notify the meeting delegates:

PRIORITIES

Always have a purpose or don't have a meeting!

Decide on the issues for inclusion in the meeting and their relative priority: Importance and urgency-they are quite different, thus must be treated differently. Important matters do not necessarily need to be resolved quickly. Urgent matters do not always need a lot of discussion. However, both matters are clearly serious priorities that need careful planning and management.

OUTCOMES

What is the purpose?

Decide the outcome for each issue, and put this on the agenda alongside the item heading. This is important as people need to know what is expected of them, and each item will be more productive with a clear aim at the outset. Examples of outcomes include the following:

- Decision
- Discussion
- Information
- Planning (e.g. workshop session)
- Generating ideas
- Getting feedback
- Finding solutions
- Agreeing (targets, budgets, aims, etc.)
- Policy statement
- Team-building/motivation
- Guest speaker-information, initiatives, etc.

SEQUENCE

Pay close attention to the order of the items on the agenda.

Urgent issues should always be placed at the top of the agenda. In the event you run out of time during your meeting, you can be assured that you at least covered your top priorities. Also, be aware of the tendency for people to be their most sensitive at the beginning of meetings, especially if there are attendees who are keen to stamp their presence on proceedings. If you are planning on discussion something controversial, give people a chance to settle down and relax first.

NOTES: _____

TIMING

Allocate a realistic time slot for each agenda item.

Long meetings involving travel for attendees require pre-meeting refreshments 30 minutes prior to the actual meeting time. Unless you have a specific reason for arranging one, avoid formal sit-down restaurant lunches – they will add at least 30 minutes unnecessarily to the lunch break, and the whole thing can make people drowsy. Working lunches are great, but make sure you give people 10-15 minutes to get some fresh air and move about outside the meeting room.

It is generally helpful to have planned times for each agenda item. You do not necessarily need to place it on the agenda for attendees. However, it is recommended that you do keep not of allocated time slots on your agenda if you are the designated facilitator as a means to keep the meeting running more efficiently.

ATTENDEES

Give careful consideration to your invite list.

It is not always clear who makes the list. Keep in mind the type of meeting, what individuals will bring a positive presence, and the do's and don'ts:

<i>Do</i>	<i>DON'T</i>
<ul style="list-style-type: none">• Consider inviting representatives from other departments to your own department meetings. If relationships are not great they will often appreciate being asked, and it will help their understanding of your issues, and your understanding of theirs• Consider inviting community members, and/or students to attend your meetings. They often can shed new light on difficult issues. Use discretion with certain sensitive issues that should be kept confidential.• Keep management in the loop of communication and gather their opinion as to who from the department should attend the meeting.	<ul style="list-style-type: none">• Invite a representative just because you don't want to leave them out. Time is money. There is a high likelihood that the representative has a busy schedule as well.• Invite a representative without giving them a detailed agenda of what the meeting entails.



***Have you invited all of the necessary people to your upcoming meetings?
Do you have an agenda for meetings that you have been invited to?***

AGENDA

Use this as a tool to control the meeting.

Be sure to include all the relevant information and circulate it in advance. It is recommended that you circulate a draft of the agenda well in advance to invitees and ask for additional items to be submitted for consideration. Send an invitation by e-mail or Outlook calendar invite. Send a final agenda to all meeting participants before the meeting

Formal agendas for board meetings and committees will normally have an established fixed format which applies to every meeting. This type of formal agenda normally begins with:

1. Absentees
2. Approval of previous meeting's minutes (notes)
3. Matters arising (from last meeting)
4. Main agenda

For more common or informal meetings (i.e. departmental, projects etc.) try to avoid the formality and concentrate more on the practicality. For each item, explain the purpose, and if a decision is required, a creative item, or for information, say so. Put timings, or time-per-item, or both (having both is helpful for the facilitator. If you have guest speakers or presenters for items, name them. Plan for coffee breaks and lunch break if it is relevant, and ensure that the caterers are informed.

Aside from these formal breaks you should allow natural "comfort" breaks every 45-60 minutes, or people lose concentration and the meeting becomes less productive. If this is an informal or creative meeting attendees should be allowed to move around the room or stand etc.

ACTIVITY



Department Brainstorming Meeting-Semester Marketing Initiative

Room 201-Administration Building , December 17, 2013

Time: 2-5 p.m.

AGENDA

Introduction

Goals and Deadlines

Brainstorming

Roles and Responsibilities

Adjourn



What is wrong with this agenda???



Department Brainstorming Meeting-Semester Marketing Initiative

Date & Time: December 17, 2013 (8:30 a.m.-10:30 a.m.)

Location: Room 201-Administration Building on

Invitees: P.R. Director, Graphic designer, photographer

AGENDA

Time	Topic	Description/Outcome	Allocated Time
8:30 a.m.	Welcome	Information sharing about the purpose of the meeting and how the time will be spent.	5 minutes
8:35 a.m.	Goals and Deadlines	Discuss goals, budget, and deadlines for strategic plan that must be submitted to executive committee.	10 minutes
8:45 a.m.	Brainstorming	Identify 2-3 concepts for the campaign. <i><u>Do some preparatory thinking about this please.</u></i>	90 minutes
10:15 a.m.	Roles and Responsibilities	Assign concept to deadlines to production members.	10 minutes
10:25a.m.	Adjourn	Clarify the time, place, and agenda for next meeting.	5 minutes

Notes: _____



Meeting Title:	Location:
Date:	Preparation:
Start Time:	Please Bring:
End Time:	

Participants:

AGENDA

Time	Topic	Description/Outcome	Person Presenting	Allocated Time

DATE

Try to select a date that causes minimum disruption for all involved.

Pre-planning meeting dates is one of the keys to achieving control and well organized meetings. Generating a “last minute meeting” can not only be a major inconvenience for people, but also lead to a higher rate of absenteeism and dissatisfaction. Be firm, and suggest a date and provide alternative suggestions.

TIME

If in doubt, always ask people what they prefer.

In general, try to start early or finish at the end of the working day. Two-hour meetings in the middle of the day waste a lot of time in travel. Be considerate of people’s traveling times after meetings, and don’t be unreasonable and offer a much earlier start.

VENUE

Plan the venue according to the situation. Leave nothing to chance.

Venue choice is critical for certain sensitive meetings, but far less so for routine, in-house gatherings. Whatever, these are certain preparations that are essential, and never leave it all to the hotel conference organizer or your own facilities department. Do not wait until the last minute to place requests. Below is a helpful checklist to follow:



- Table and seating layout
- Top-table (if relevant) position
- Tables for demonstration items, paperwork, and hand-outs, etc.
- Electricity power points and extensions
- Microphone and sound equipment
- Permission to videotape and photograph on site
- Heating and lighting controls
- Projection and flip chart equipment positioning and correct operation
- Whereabouts of toilets and emergency exits-fire drill
- Map, parking, and signage for attendees
- Confirm reception and catering arrangements
- Back-up equipment contingency

All of the items mentioned on the previous page can and will go wrong unless you confirm. Always check in with the venue or facilities management days before the meeting. For a big important meeting, you should also arrive at least one hour early to check to see if everything is as you requested it.

Positioning of seating and tables is also very important, and for certain types of meetings it's crucial. Ensure that the layout is appropriate for the occasion:

- ❖ Formal presentation to large groups-theatre style -audience in rows, preferably with tables, facing speaker.
- ❖ Medium sized meetings-horse-shoe (U) table layout with open part of the U facing the speaker.
- ❖ Small meetings for debate and discussion-board-room style-one rectangular table with speaker at one end.
- ❖ Relaxed team meetings for planning and creative sessions-lounge style, with easy chairs and coffee tables.

RECOMMENDED READINGS

- Murphy, M. (2013). No More Pointless Meetings. *No More Pointless Meetings*, 1.
- CRASH COURSE IN... HAVING EFFECTIVE MEETINGS. (2008). *Management Today*, 22.
- Presley, J., & Keen, S. (1975). Better Meetings Lead to Higher Productivity: A Case Study. *Management Review*, 64(4), 16.
- MORRIS, R. A., & SEMBER, B. (2008). CHAPTER 10: MYTHS ABOUT STATUS MEETINGS. In, *Project Management That Works: Real-World Advice on Communicating, Problem-Solving, & Everything Else You Need to Know to Get the Job Done* (pp. 111-123). American Management Association International.
- Donlon, B. S. (2007). Effective Leadership Behavior for Strategy Review Meetings. *DM Review*, 17(4), 30.
- 10 Steps to Successful Meetings. (2010). *10 Steps to Successful Meetings - Business Book Summaries*, 1(1),
- Wachtel, G. (2009). LET'S GET TOGETHER. *ABA Bank Marketing*, 41(6), 32-36.
- Black, E. (2008). Meeting Nightmares. *Officepro*, 68(5), 24-27.
- Hollingworth, M. (2012). SMART WORKPLACE CONVERSATION: THE KNOWLEDGE ECONOMY'S (NEW) ORGANIZATIONAL VALUE CHAIN. *Ivey Business Journal*, 76(1), 33-36.
- Gyulay, M. (2005). Heighten credibility through effective meeting management. *Healthcare Purchasing News*, 29(4), 64.
- Hampian, K. (2009). How to hold a dove. *Public Management (00333611)*, 91(10), 16-17.
- Marvel, K., Gunn, W., & Brezinski, K. L. (2004). Push and Pull: Resolving Differences of Opinion During Meetings. *Physician Executive*, 30(5), 44-48.
- Prepare yourself for success. (2005). *Manager: British Journal of Administrative Management*, (45), 17.
- Chaney, L. H., & Lyden, J. A. (1998). Managing meetings to manage your image. *Supervision*, 59(5), 13.
- EFFECTIVE MEETINGS. (1996). *Executive Edge Newsletter*, 27(12), 7.