

# *Effective Meetings*



A short course

# *How to Hold a Successful Meeting*



- Republish the Agenda
  - Republish the agenda one to five days in advance, so that participants can prepare
  - When they arrive prepared, up to 80 % of the work can be done before the group members assemble

# *How to Hold a Successful Meeting*



- Separate the different types of meeting work
  - Separate mission work from process work
  - Process meetings:
    - Passdowns
    - AR/status reviews
    - Recommendations
    - Opens/news

AR=Actions required (assignments)

# *How to Hold a Successful Meeting*



- Mission Meeting
  - Problem analysis
  - Decision making
  - Planning

# *How to Hold a Successful Meeting*



- State expected outcomes
  - state the specific output or action expected from the meeting
  - Listing clear outcomes helps members prepare for their participation

# *How to Hold a Successful Meeting*



- Give time frames
  - Schedule a specific amount of time for each item
  - Hence, participants know the relative importance of each item and how much time will be devoted to it.

# *How to Hold a Successful Meeting*



- List attendees, so that
  - they know their roles
  - they should prepare accordingly
  - if it is appropriate to send a representative

# *How to Hold a Successful Meeting*



- Announce the decision method, so that participants
  - understand their roles
  - can prepare accordingly



# *Two kinds of meetings*



- Mission meeting
- Process meeting

# *Two kinds of meetings*



- Purpose
- Appropriate Subjects
- Schedule
- Structure and Membership
- Memory System
- Group Dynamics
- Process and Resolution
- Suggested Techniques

# *Leader Responsibilities*

## *General responsibilities*



- Preparation
  - Provide date, time, location, phone number.
  - Provide an agenda
  - Ensure the group's membership is structured correctly
  - Consider scheduling the meeting for less than an hour
  - Build in 10 minutes' passage time for those going to other meetings

# *Leader Responsibilities*

## *General responsibilities*



- During the meeting
  - Start on time
  - Review the meeting's purpose: ask “ Why are we here ? ”
  - Define tasks and roles
  - Set ground rules
  - Follow the agenda
  - Use appropriate techniques for guiding activities

# *Leader Responsibilities*

## *General responsibilities*

- Use discipline to ensure everyone's participation in phone meetings
- Keep a bin list
- Summarize outputs: ask “What did we resolve? Next steps ? ”
- End on time
- Follow-up
  - Publish meeting minutes within 24 hours
  - Tracks ARs

# *Leader Responsibilities*

## *Meetings-specific responsibilities*

- Mission meetings
  - Provide and inclusion activity to ensure equal participation and leverage group intelligence
  - Provide group memory
- Process meetings
  - Provide a recognition activity to reinforce formal roles and maintain relationships.
  - Control the agenda by screening items for inclusion
  - Delegate activities “cleanly”
  - Provide documentation

# *Participant Responsibilities*

## *General Responsibilities*



- Preparation
  - Read the agenda
  - Add the meeting to your calendar
  - Gather relevant material
  - Complete any ARs that are due

# *Participant Responsibilities*

## *General Responsibilities*



- During the meeting
  - Arrive on time
  - Help enforce “one meeting”
  - When disagreeing, focus on the *idea* not the *person*
  - Avoid/call rat holes
  - Confirm decisions and ARs
- Follow up
  - Read meeting minutes
  - Complete assigned ARs



# *Participant Responsibilities*

## *Meeting-specific Responsibilities*



- Mission meetings
  - Participate in your role as defined in the “expected outcome” section for each agenda topic.
  - Clarify your role if necessary
  - Bring up the meeting’s purpose if it is not stated
  - Follow ground rules
  - Volunteer to be the time keeper or recorder
  - Share the “air time” with others

# *Participant Responsibilities*

## *Meeting-specific Responsibilities*

- Process meetings
  - Listen for understanding
  - Act in your formal role in the organization's structure
  - Resist the temptation to jump into mission meeting work; help delegate instead
  - Act as a resource to the leader
  - Ask clarifying questions
  - Do not move on to the next topic until you understand what was decided and who took responsibility for which activities.
  - Review reports and recommendations with intellectual vigor