



Effective Meetings

The effectiveness of an organization is directly related to the ability of its people to run effective meetings. Though this is not a skill that is taught in college or the work place, it is critical that you improve your capability to run efficient meetings. There are three key steps:



Managers need to set good examples in conducting effective meetings and in setting the tone for acceptable behaviors. Each participant demonstrates their followership based upon the way they engage in the process of a meeting. Meetings should be scheduled for a specific purpose, and the focus of all participants must be on achieving that purpose.

Tip: Before scheduling a meeting you should consider what you need to accomplish and who needs to participate. Make sure that holding a meeting is the best means of achieving the result.

Plan and Prepare

The first step to an effective meeting is planning and preparation. When planning a meeting, you must define the purpose, create an agenda, and send an invitation. The purpose statement clearly states the reason for the meeting. The agenda defines the topics that are to be discussed and the order in which they are to be discussed. The meeting invitation identifies participants, the role of each person, and it provides any information that needs to be reviewed prior to the meeting. Preparation ensures that all three components are done in advance of the meeting and with sufficient time for the participants to prepare themselves.

1. Define the Purpose

The purpose of a meeting could be to inform, to make a decision, to get input, or many other reasons. What is essential is that the purpose for the meeting is clearly defined so the agenda and supporting materials achieve the purpose. The purpose can be broken down into objectives that complete the statement, “by the end of this meeting I want the group to...”

2. Create an Agenda

An agenda provides clear direction about the topics to be covered during the meeting. The agenda needs to include a brief description of the meeting purpose and objectives, a list of the topics to be covered, and who will address each topic for how long.



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3. *Send an Invitation*

Be respectful of participants by giving sufficient advance notice of upcoming meetings. Whenever possible, check participant's calendars to select a time that everyone is available. Title the meeting to correspond with the purpose of the meeting. Provide the administrative details such as the date, time and location of the meeting. It's also helpful to identify any required preparation activities or summarize the list of open action items from the last meeting as a reminder for participants. Ask those invited to accept or decline the meeting. Make it clear that once they have accepted the meeting, they are expected to attend.

Based upon the meeting purpose, participants are welcome to request an agenda item up to two days before the meeting. They should email the organizer with their request and the amount of time they will need to present it. If a request is made that does not align with the purpose or could be handled effectively outside the meeting, email the requester and suggest an alternative approach to addressing the topic.

Send the agenda to all the meeting participants at least 24 hours prior to the meeting with a reminder of the meeting purpose, location, time and duration.

Facilitate

There are five key roles that are essential in effective meetings and some ground rules that must be followed.

Roles

The various roles in a meeting include sponsor, organizer, participant, note taker and facilitator. A meeting sponsor is the person who decides to hold the meeting. This person may lead the discussion at the meeting or delegate that to a facilitator. The organizer is responsible for the planning and preparation steps. The participant is expected to arrive on time, be fully prepared and participate in a constructive manner. The note taker role may be a participant or the organizer. The note taker records what happened in the meeting and sends out the minutes which include the agreed upon action items. The facilitator manages the meeting and is responsible for the flow of the meeting. Each of these roles is critical to the effectiveness and successful outcome of a meeting.

1. Sponsor – accountable for an effective meeting
2. Organizer – responsible for planning and preparation
3. Participant – engages fully and participates with respect
4. Note Taker – creates a written record of the meeting
5. Facilitator – manages the flow of the discussion and stays focused on accomplishing the purpose of the meeting



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Rules

Meetings must begin on time to set the stage for how serious you are about making the meeting effective. It also positively reinforces the participants who show up on time.

Each team can formulate their own list of meeting rules. Here is a list of widely used and very beneficial discussion rules:

- Show up on time
 - Be respectful
 - Be brief and stay focused
 - No personal attacks
 - Listen actively
 - No killer phrases **
 - No generalizations (never, always, etc.)
 - Critique is ok **if** you provide an alternative
- ** Sentences, phrases or questions that kill conversation such as:
- That won't work here
 - We have done that before
 - It is too expensive
 - Are you an expert in our industry?
 - Others have tried that already
 - etc.

Follow Up

After a meeting, participants should receive a copy of the minutes which include the action items. The minutes serve as a written record of discussions, decisions and actions that each participant committed to accomplish.

Applying the three simple steps of Plan and Prepare, Facilitate and Follow Up will ensure that you conduct effective meetings.