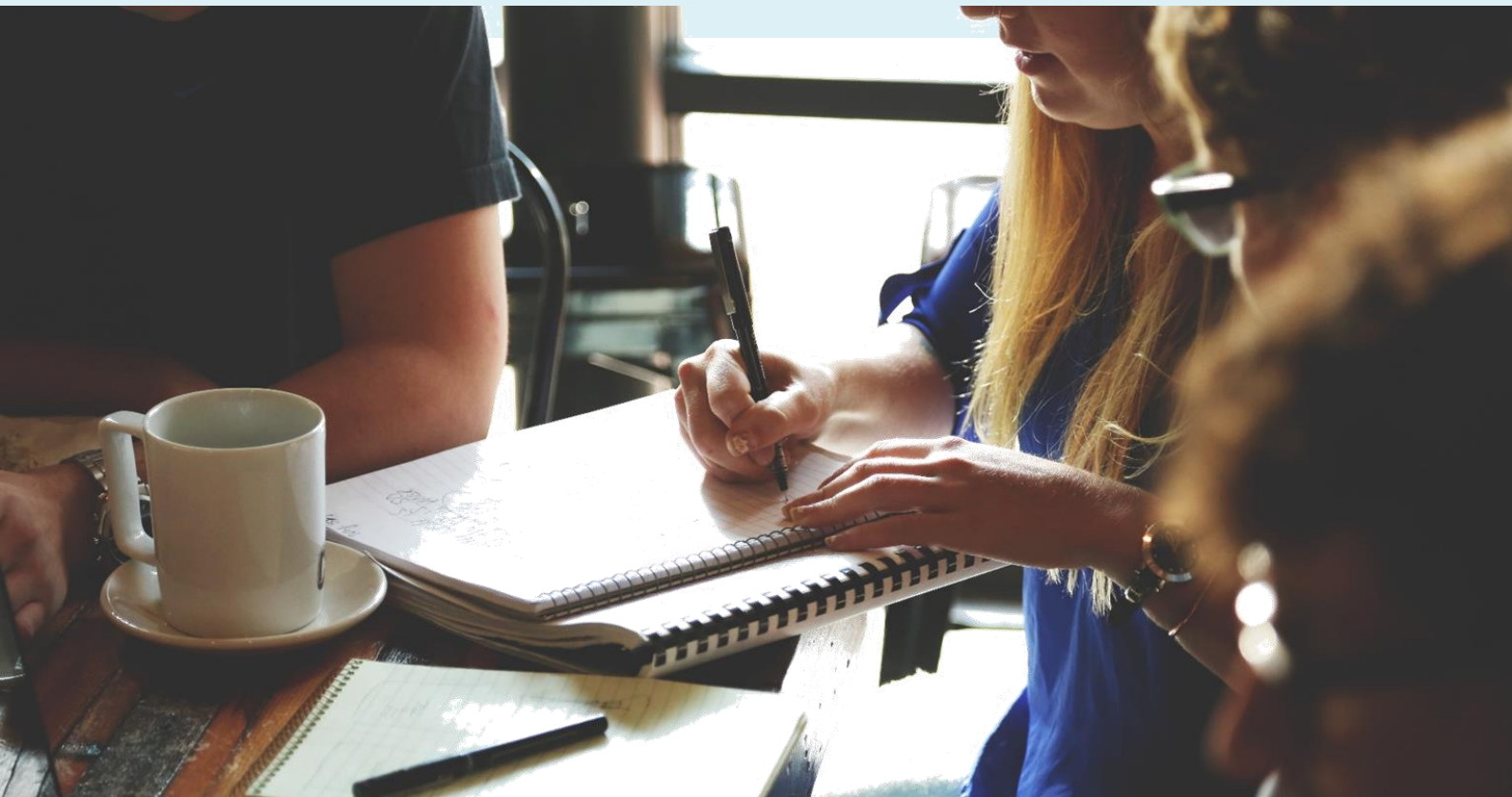


MAKE MEETINGS HAPPEN

Self-Paced Guide



DAVID JONES

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How will this Reference Help?

This reference will help you to plan, schedule and manage meetings more effectively to achieve your desired outcomes.

You'll learn to;

- Recognise the situations when a meeting is necessary
- Explain the effect attitude, control and participation can have on the productivity of a meeting
- Establish the five steps to planning a meeting and how these formulate the agenda
- Describe the four main roles at a meeting
- Determine the four steps to the OPEN technique
- Explain how to move a meeting through the agenda items using the four process steps
- Identify common difficult behaviours encountered when managing participation
- Apply the CLOSE technique
- Explain the importance of evaluating and following up after a meeting

To complete this learning effectively you need to follow the instructions in this Reference Guide. Each section will help you achieve one or more of the learning outcomes.

There are a number of activities to help you develop the skills and knowledge required to make meetings happen. They may ask you to answer questions, discuss issues with others or find additional information.

As you follow the sections, you will notice a number of icon prompts. Each icon signals different types of activities that you may or may not wish to do.



TIP



HINT



ACTIVITY

As you progress through this guide you may wish to refer to your manager for assistance or information. Your manager is there to support your learning.

ABOUT MEETINGS

Is a meeting necessary?

With the growth of technology in the workplace, many people might expect the need for meetings to diminish. Although meetings may be shorter and less formal in today's workplace, flatter structures, work teams and the emphasis on participation, has increased rather than decreased the need for meetings.

Meetings are essential whenever an organisation needs to inform, discuss, make decisions or take action, and may take place face-to-face or through the use of technology.

What is a meeting?

A meeting is two or more people actively communicating, at a given time, for a common purpose.

People meet for many different reasons. Some of which are productive, and others counter-productive. The best reason for holding a meeting is when a group, working together, can produce better results than individuals working alone.

For example;

- When different perspectives on a single issue are needed
- When the expertise of others is needed to make an informed decision
- When synergy is needed

Calling a meeting for the wrong reason can be costly.

- People's time costs money – they spend time at the meeting, and time preparing for it.
 - Facilities, travel, refreshments and equipment cost money
 - Because people can't carry out their normal work while they're at a meeting, there is also the cost of lost production or opportunities.
-

For meetings to be cost effective, they need to be productive. A meeting is only productive if all attendees believe that it produced worthwhile results.

To avoid wasting time and money, be sure that the meeting you intend holding is necessary and that it will produce worthwhile results.

Continued on next page

Is a meeting necessary?, Continued



ACTIVITY

What meetings have you attended lately? Was the meeting necessary?

In the table below, list some reasons why the meetings you attended were held. After you have listed a number of reasons, develop and record a purpose statement for each.

Is there any possible alternatives for achieving the purpose without holding a meeting?

Reason for meeting	Purpose of the meeting	Alternatives?

What makes a meeting productive?

1. You are more likely to benefit from a meeting if you arrive with a positive attitude.
2. If one person dominates a meeting, participants may feel intimidated and find it hard to participate. However, if a meeting has no direction, participants can lose focus and time is wasted.
3. For meaningful participation to occur attendees need;
 - Time to prepare beforehand
 - Guidance during the meeting

A good meeting is a productive meeting. Ensure your meeting is productive by having a positive attitude and balancing control and participation.



TIP

There are ways to keep control of the meeting, yet allow participation. Balance control and participation in a meeting by having a clear purpose, making it known to all attendees and using it to structure the meeting.

PLANNING THE MEETING

Define the purpose

There are 5 P's you can use to help you plan a meeting;

- Purpose
- People
- Prerequisites
- Practicalities
- Points



Continued on next page

Define the purpose, Continued

'Purpose' is the first P to planning a meeting. If you know exactly what end result is expected, it's much easier to gauge when you have achieved it.

When defining the purpose of a meeting, think of the outcome that you want to achieve. Ask yourself, 'What do we want at the end of this meeting that we don't have now?' Formulate the answer into a statement and begin it with the words, 'The purpose of this meeting is to....'

Clearly stating the outcome that you expect from a meeting will let everyone know what they're aiming for. It will also enable you to assess afterwards whether the meeting has been successful and achieved its aim.

Once the purpose of a meeting has been defined, it is worthwhile checking whether there is an alternative way to achieve the purpose other than holding a meeting. For instance, it may be possible to phone or send written communication to the relevant people, or it may be more effective to visit each person individually.

If however, it's necessary for people to interact with each other to achieve the purpose, then a meeting is needed.



HINT

A meeting doesn't always have to take place face-to-face, video or phone conferencing can be used.

Refer to the Teleconference Calls Bulletin located on the David Jones Bulletin Board for more information about this service.

Select attendees and roles

'People' is the second P to planning a meeting. When it comes to selecting people for a meeting, the main thing to ask yourself is whether the person can contribute. Will their attendance make a difference to the outcome of the meeting?

It is important to be objective and focus on essentials when selecting the people who should be included.

People are sometimes invited because of protocol, or because they will be offended if left out. It is also sometimes tempting to invite an ally, especially if you are lacking confidence.

If someone you haven't invited feels they should be there, explain to them why they have not been included.

Every attendee should play an active role at a meeting. The key roles of an effective meeting are;

- Leading
 - Facilitating
 - Recording
 - Participating
-

Leading

Leading the meeting means managing the content and structuring the meeting. It usually involves;

- Deciding to call a meeting
 - Preparing an agenda
 - Opening the meeting
 - Handling content issues during the meeting
 - Closing the meeting
 - Following up on assignments
-

Facilitating

Facilitating is the people aspect of a meeting. It involves;

- Moving the participants through the agenda items, and keeping to time
 - Managing interaction and encouraging participation
 - Recapping regularly to keep participants focused
-

Continued on next page

Select attendees and roles, Continued

Recording

Recording means keeping a record of the key points throughout the meeting. It involves;

- Keeping a visual record
 - Producing the minutes
-

Participating

Participating means taking an active part in the meeting. Everyone at a meeting is a participant, regardless of any other role they fulfil. It involves;

- Reading the agenda and preparing for the meeting
 - Listening to others, contributing and stating concerns when appropriate
 - Evaluating the meeting
 - Meeting commitments made during the meeting
-



TIP

You may want to delegate some of the roles or you may feel the meeting is small or routine enough for you to perform the functions of Leading, Facilitating, and Recording yourself.

Establish prerequisites

'Prerequisites' is the third P to planning a meeting. You can't expect participants to prepare for your meeting if you don't tell them exactly what's expected of them. They need to know what to do before the meeting and what to bring with them.

There are a number of reasons why participants may not be prepared for the meeting and therefore be unable to contribute effectively. These include;

- Insufficient time to prepare for the meeting
- Insufficient information provided before the meeting
- Incorrect information provided before the meeting

If the meeting requires detailed preparation, the agenda needs to be sent out well in advance.

Organise practicalities

'Practicalities' is the fourth P to planning a meeting. The length of the meeting, starting time, availability of equipment, refreshments, and general condition of the meeting room all need to be considered.

Time

The length of a meeting depends on the number of attendees and whether or not they know each other. The number of agenda items and how complex they are also influences the length of a meeting.

Try to be realistic – over estimate rather than under-estimate the length of your meeting. If there seems to be too much to get through, schedule another meeting. If this is not possible, pace a long meeting by having adequate breaks.

Once you know how long your meeting needs to be, you can set a starting time. The best time for a meeting is the time that suits the majority of the attendees. If you plan to include remote members, be aware of time zones.

Place

Anticipating possible distractions in the venue can make a difference to the success of your meeting. Check the condition of the room beforehand (especially if your venue is used for things other than meetings) and eliminate as many distractions as possible.

Equipment

To encourage participation, people should be able to see each other and no one person should sit in a dominant position. For smaller meetings a round or square table is most suitable. For larger meetings you may wish to set the room in a horseshoe arrangement.

The record needs to be visible throughout the meeting. Projector, electronic white-board, or flip chart all work well.

Determine agenda items

'Points' is therefore the fifth P to planning a meeting. The points or agenda items, are the topics or issues to be covered during the meeting.

Here is an example;

What	How	Who	How long
Open the meeting	Present	Penny	5 mins
Check all have read attachments	Information sharing	Emily	10 mins
Present results of client survey	Information sharing	Barry	10 mins
Brainstorm ideas for improvement	Group discussion	Emily	45 mins

The agenda items can be set out in a number of ways – from a bulleted list of topics to a detailed table of what, how, who and how long for each item.

The way you set out your agenda items will depend on the complexity of the meeting you are running. However, the more information you give, the better your attendees can prepare.

A meeting generally moves through four basic process steps: inform, discuss, decide, and act.

Inform – A meeting called to share information will stop when everyone has had their say.

Discuss – A meeting called to discuss issues may begin with information sharing, and then move on to discussion, but no decisions will be made.

Decide – A meeting called to make a decision may present information, open the topic for discussion, and then call for a decision.

Act – A meeting called to take action may begin with the exchange of information, followed by discussion and decision making, and end with the required action being planned or taken.

Not all meetings will go through all four process steps, but they are consecutive. If a meeting has a number of topics, then it may move through the process, or part of the process, a number of times.

Continued on next page

Determine agenda items, Continued

Once the five P's of planning have been done, an agenda can be written and distributed to all attendees.

Here is an example;

Agenda

When: Wednesday 29th March
10.30am – 12.30pm

Where: Meeting Room 1

Purpose: To draw up an action plan for improving the customer experience

Attendees: Barry
Bob
Emily – Facilitator and recorder
Jim
Penny – Leader
Rachel

Prerequisites: Read attached customer suggestions and bring them with you for discussion

Agenda Items:

What	How	Who	How long
1. Open the meeting	Present	Penny	5 mins
2. Check all have read attachments	Information sharing	Emily	10 mins
3. Present results of customer survey	Information sharing	Barry	10 mins
4. Brainstorm ideas for improvement	Group discussion	Emily	45 mins
5. Select the best ideas	Group decision making	Emily	20 mins
6. Allocate ideas for further investigation	Action plan	Emily	15 mins
7. Close the meeting	Presentation	Penny	5 mins

An agenda lets attendees know what the meeting is about and should cover;

- **Why** the meeting is being held – Purpose
- **When** and where it's to be held – Practicalities
- **Who** will be there – People
- **What** is expected of the attendees – Prerequisites
- **How** the meeting will proceed – Points

Continued on next page

Determine agenda items, Continued



ACTIVITY

Think of a meeting that you have recently scheduled or are going to be scheduling shortly.

Using the principles discussed, complete an agenda for the meeting using the template below.

Agenda

When:

Where:

Purpose:

Attendees:

Prerequisites:

Agenda Items:

What	How	Who	How long
1.			
2.			
3.			
4.			
5.			
6.			
7.			

Continued on next page

Determine agenda items, Continued



HINT

Compare your agenda with the following checklist.

Item	Yes	No
Is the purpose stated as the meeting outcome?		
Are the date and place noted?		
Are the starting and ending times stated?		
Are the invited attendees listed?		
Are the roles identified?		
Are the prerequisites noted?		
Are the agenda items listed so they are clear to the reader?		
Is the method of handling each agenda item indicated?		
Is the person responsible for each agenda item noted?		
Is the length of time for each agenda item states?		

If you answered **No** to any of the above listed items, you may wish to revisit your agenda and focus on these areas when you are developing future agendas.



HINT

With repeating meetings, it is best to review the minutes and/or action items from the previous meeting to ensure items are followed-up and acted on and do not need to be readdressed.

OPENING AND EXPANDING THE MEETING

Opening the meeting

Before opening the meeting, at times you may have to deal with someone running late.

When someone is late for a meeting, you will need to decide what to do;

- Wait for them – if you are prepared to wait a short while for latecomers, then state a length of time. This option gives the person who is late some leeway and those already present know there is a limit to how long they need to wait.
- Try and find them – asking someone else to locate the latecomer is effective, if the latecomer is close by. However, it can be counter-productive, as you now have two people missing from your meeting.
- Call them – this is a good option as you can find out how long the person will be. If they are delayed indefinitely, you should begin the meeting. If they are on their way, you can probably wait a few minutes.
- Start without them – this is a good option when the person you are waiting for is habitually late. Knowing that people will not wait for them may make latecomers try a little harder to be on time in the future.

Starting late will annoy the people who are on time and they may be inclined to come late themselves next time.

When a latecomer finally does arrive, welcome the person and fill them in quickly. If it is an awkward time, refer to the agenda and fill them in later at a convenient time, for example, during a break or when summarising.

If latecomers become a persistent problem, try to find out why they are late and what needs to change.

Continued on next page

Opening the meeting, Continued

You can use the word OPEN to help you remember the steps to opening a meeting.

Orientate everyone

The first few minutes of a meeting should include everyone, so they all feel part of the group. If people don't know each other, this is a good opportunity for them to briefly introduce themselves.

Present the purpose

Although the purpose appears on the agenda, it is important to reinforce it during the opening. Participants need to know why they are there and what needs to be accomplished.

Establish the Agenda items

Establishing the agenda items allows everyone to agree on each item and how it is to be handled. If necessary items can be added at this stage.

Nominate roles and rules

Being clear about who will be doing what will avoid surprises or confusion later. When setting ground rules, make suggestions and invite agreement from the participants. Ground rules should be specific, positive and relevant.

Taking time to open a meeting properly will focus the group, clear people's minds, and set the scene for the meeting to expand. This is particularly important when an unexpected or emergency meeting is called and there is no time to send out an agenda.

Share information

Information can be shared in three ways by;

- Giving it out beforehand thus saving time during the meeting
- Giving a short presentation – this ensures that everyone gets the same information and a chance to ask clarifying questions
- Bringing new information to the meeting

New, unexpected information can interrupt the focus of the meeting and disrupt timing. When faced with new information you need to assess its importance. If it is relevant you need to decide how to handle it – deal with it, defer it (or refer it), but don't dismiss it, even if it means adjusting your agenda to accommodate it.

During the sharing of information people often ask questions or offer comments. It is important to differentiate between questions and comments that will clarify information and those that will lead to discussion. Discussion should not begin until all the information has been presented and understood by all attendees.

Questions that clarify information usually require a short answer or confirmation and can be dealt with quickly. They should be encouraged.

Questions that involve opinions and start a discussion or jump to decision making might take the meeting too far ahead. It is better to hold these questions until the appropriate time.

Sharing information continues the expansion of the meeting and ensures that all attendees have the same information and understand it. Only when this has been done, can constructive discussion begin.



TIP

If other issues are raised or the conversation gets off track, manage the meeting by using a 'Parking Lot'.

- Acknowledge the conversation
 - List the topic on a board or flipchart
 - State that you will revisit the item later
 - Go on with your meeting as planned
 - Revisit or take appropriate action at the end of the meeting, for example, agree to meet to discuss at another time
-

Facilitate discussion

There are four common difficult behaviours you may need to handle when facilitating discussion;

- Dominant behaviour
 - Non-participative behaviour
 - Critical behaviour
 - Rambling behaviour
-

Dominant behaviour

Dominant behaviour can take two forms; being domineering, or commanding the conversation.



TIP

Domineering behaviour – will intimidate the other attendees. You need to protect the rest of the group by down playing this overbearing approach.

Commanding the conversation – attendees at a meeting where there is an overly talkative person may sit back and let the person take over. Thank the person and then call for comments from the rest of the group.

Non-participative behaviour

There are two types of non-participation: being reserved or being hostile.



TIP

Reserved – a person who is reserved or reticent may have something worthwhile to say. You need to draw them out and give them confidence to speak up. Invite them to participate, preferably in an area with which they are familiar.

Hostile – a person who is hostile and refusing to participate can be disruptive. Sometimes a direct question like 'You don't seem convinced, why is that?' can help them voice their disapproval so it can be addressed.

Continued on next page

Facilitate discussion, Continued

Critical behaviour

Critical behaviour can take two forms: finding fault just to be negative, or raising objections because you see a problem.



TIP

Negative – voicing the negatives of a situation can be destructive if it destroys ideas. Acknowledging the objection and asking the person to explain and be specific often helps them see how superficial their objection is.

Analytical – a critical response that tries to analyse the situation can be constructive as it can help the group examine their ideas. Take the objection seriously and discuss it.

Rambling behaviour

There are two types of rambling behaviour, taking too long to make a relevant point or getting side-tracked.



TIP

Taking too long – a chatterer can destroy the focus and unity of a meeting. Sometimes the person knows what they want to say but takes too long to get to the point. Try to clarify the point, record it and move on.

Getting side tracked – a rambler may also get completely off track and deviate to unrelated issues. Draw them back into the meeting with a question related to the issue at hand, and then move on.

Facilitating discussion fully expands the meeting. To keep discussion flowing and the meeting moving, keep focused on the purpose while managing participation, and be aware of time.

Continued on next page

Facilitate discussion, Continued



ACTIVITY

Time for practice.

At your next meeting focus on practicing your opening.

Evaluate your opening using the following table;

Step	Comment
O rientate everyone	
P resent the purpose	
E stablish the Agenda items	
N ominate roles and rules	

Summarise your comments by asking yourself the following questions;

What did I do well?

What would I do differently next time?

NARROWING AND CLOSING THE MEETING

Keep a visual record

A visual record is a cumulative account of the progress of the meeting and should be visible to all participants throughout the meeting.

A visual record;

- Provides a physical and mental focus to the meeting
- Assists memory – it is much easier for participants to remember something if they can refer to a visual record
- Provides continuity – participants can refer back to what has happened
- Gives a sense of achievement – it shows concrete evidence of progress
- Allows individual ideas to become group ideas – once a suggestion has been made and recorded it belongs to the group.



HINT

At important meetings where some participants are taking part remotely, like a video or tele conference, the recorder can record on sheets of paper and fax the notes at strategic points during the meeting.

Make decisions and plan action

Decision making involves choosing between alternatives and can be done during or after a meeting.

There are four ways decisions can be made in relation to a meeting.

- **External decision making**

External decision making is where a higher authority makes decisions external to the meeting. Those at the meeting discuss issues and may prepare a report with recommendations, but do not make any decisions.

- **Participative decision making**

Participative decision making is where the most senior person at the meeting makes the decisions. The meeting provides the decision maker with information, opinions, and recommendations.

- **Task force decision making**

Task force decision making is where the decision is delegated to a sub-committee, task force or individual to make after the meeting. The meeting probably does little more than raise the need for a decision.

- **Team decision making**

Team decision making is where the attendees make decisions during the meeting. A team decision means aiming for agreement from all attendees. This process may involve evaluating suggestions or ideas.



TIP

If you find that the group cannot come to an agreement, you may want to call a short break.

A break can refresh participants, give them opportunity to discuss casually or think about the topic from other perspectives.

It may be necessary to evaluate the suggestions or ideas in order to facilitate the decision making process. Participants evaluate each idea individually and then consolidate their thoughts to see which ideas come out as the most appropriate. One way of doing so is to invite each participant to list the advantages and disadvantages as they see them for each alternative.

Continued on next page

Make decisions and plan action, Continued

Taking action means carrying out the decisions made at the meeting. You can either draw up an action plan or take action at the meeting itself.



TIP

When allocating assignments, a good strategy is to call for volunteers, and then prompt the remaining participants. If there are more people than tasks, people can work in pairs or small groups.

If there are more tasks than people, some people may be prepared to take on more than one task.

Close the meeting

A short wrap-up at the end of a meeting gives all participants a sense of closure. The CLOSE technique will ensure that all the steps of a good close are covered.

Call a halt

Focus everyone's attention and ask for any final comments.

List the outcomes

Listing the outcomes means recapping on any decisions made or on the action plan.

Obtain commitment for assignments

Ensure that everyone understands and accepts what they need to do after the meeting and, if there is a follow up meeting, what is required for that meeting.

Set up the next meeting

Suggest a time to meet and ensure both the time and place are suitable to everyone.

Express appreciation

End the meeting by thanking everyone for their efforts and involvement.

Continued on next page

Close the meeting, Continued



ACTIVITY

Time for practice.

At your next meeting focus on practicing your close.

Evaluate your close using the following table;

Step	Comment
C all a halt	
L ist the outcomes	
O btain commitment for assignments	
S et up the next meeting	
E xpress appreciation	

Summarise your comments by asking yourself the following questions;

What did I do well?

What would I do differently next time?

AFTER THE MEETING

Evaluate the meeting

One of the best ways to improve your meetings is to evaluate them. You can do this by asking participants for their feedback and by keeping a personal assessment log.

You can collect feedback informally by asking participants immediately after the meeting or sometime later. Sometimes it is appropriate to ask participants to formally complete a questionnaire.

Taking time to collect feedback from participants also builds commitment to the results of the meeting. You can ask participants: 'What went well?' and 'What could have been better?'.

Another way to evaluate for improvement is to keep a personal assessment log. This is a record of your own feelings about the meeting and it should be done as soon as possible afterwards.

When writing down your own impression of your meeting it is helpful to ask yourself: 'What went well?' and 'What would I do differently next time?'.

Continued on next page

Evaluate the meeting, Continued



ACTIVITY

What problems are you having with your meetings now?

Think about the recent meetings you have lead or participated in, what were some of the common problems associated with the meetings?

For example;

- People came late
- There was no agenda
- Some participants did not contribute

List them below.

In the right hand column come up with some suggestions to remedy these problems.

Problem	Possible solutions

You may wish to discuss your suggestions with your manager.

Follow up

After the meeting the results need to be set down in a written record and distributed to all attendees and other relevant people. The agenda and visual record can be used to prepare the written record.

It may not be too difficult to recall the key points soon after a meeting but it would be after a few days or weeks. People tend to see things from their own perspective, and memory fades over time.

A written record is the most reliable account of a meeting as it provides a permanent history of the;

- Date
 - Time
 - Place
 - Key issues and results
 - Allocation of assignments
 - Date and time for any follow up meetings
-

REVIEW YOUR LEARNING

What have you learnt?

As well as being aware of when and how to hold a meeting and who to invite, for positive and effective meetings you need to know and use all of the activities and techniques until they become your normal way of doing things.

Over the coming weeks, notice the ways you have changed what you do because of the learning activities you have completed in this Reference Guide.

To assist you in your reviewing your learning, compare your performance against the learning outcomes;

- Recognise the situations when a meeting is necessary
 - Explain the effect attitude, control and participation can have on the productivity of a meeting
 - Establish the five steps to planning a meeting and how these formulate the agenda
 - Describe the four main roles at a meeting
 - Determine the four steps to the OPEN technique
 - Explain how to move a meeting through the agenda items using the four process steps
 - Identify common difficult behaviours encountered when managing participation
 - Apply the CLOSE technique
 - Explain the importance of evaluating and following up after a meeting
-

CONGRATULATIONS on making meetings happen!
