

# Conducting Effective Meetings

# Getting Started

*Meetings  
without an  
agenda are like  
a restaurant  
without a menu.*

***Susan B.  
Wilson***

Over the next 90 minutes, give or take, I will talk about tools for initiating and managing dynamic meetings.

This will include planning, and leading techniques that will give you the edge to run an engaging meeting that leaves a positive lasting impression and, most importantly, gets results.

# Workshop Objectives

## Planning and Preparing

- Participants
- Location
- Agenda

## Roles & Responsibilities

- The Chairperson
- Participants
- Recorder (minutes)

## Disruptive Behavior

## Maximizing your Meetings

# 1. Planning and Preparing

- Successful meetings are planned events; they don't happen by accident.
- The people, location and purpose (of the meeting) are key factors that can affect the success (and outcomes) of your meeting.
- Planning and preparation disarm actions that can derail a meeting.

# Identifying the Participants

Meeting  
purposes?

Do not invite  
everyone

Be specific

Remove non-  
contributors

# Choosing the Time and Place

Time of day is important

Location affects meeting dynamic

Is privacy needed?

# Creating the Agenda

S

- Seek topics from your participants

O

- Organize topics into a list

A

- Assess which topics are relevant to the meeting purpose

P

- Pick the number of relevant topics that will fit into your meeting time

# Materials, Invitations and Logistics

There are two ways of meeting difficulties: You alter the difficulties or you alter yourself to meet them.

**Phyllis Bottome**



# Gathering Materials



**Stationary**

**Handouts**

**Organizer**

**Writing tools**

**Special requests**

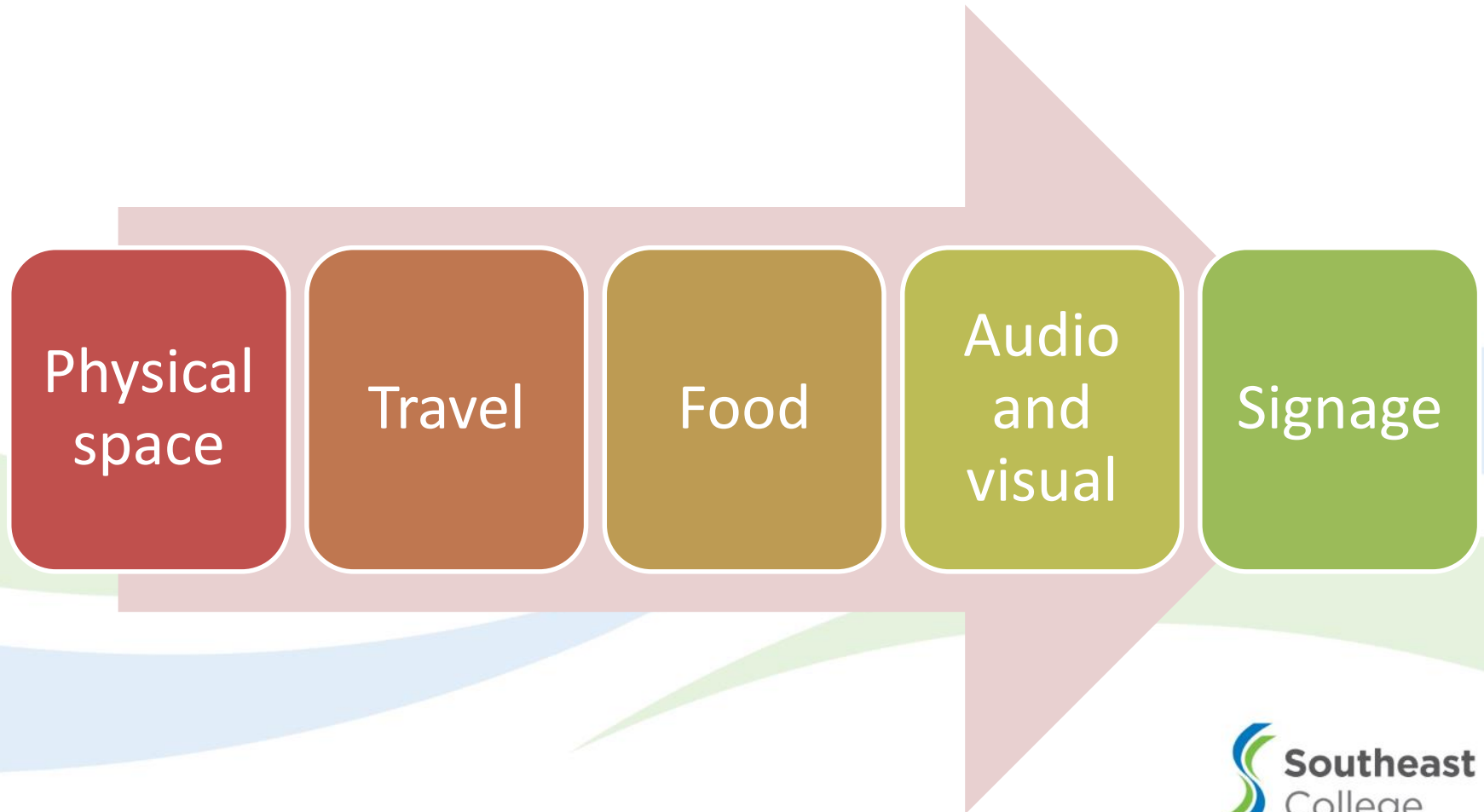
# Sending Invitations

**Purpose:** the purpose of your meeting must be stated

**Place and Time:** determine ahead of time where and when

**Pact:** create a sense of binding agreement

# Making Logistical Arrangements

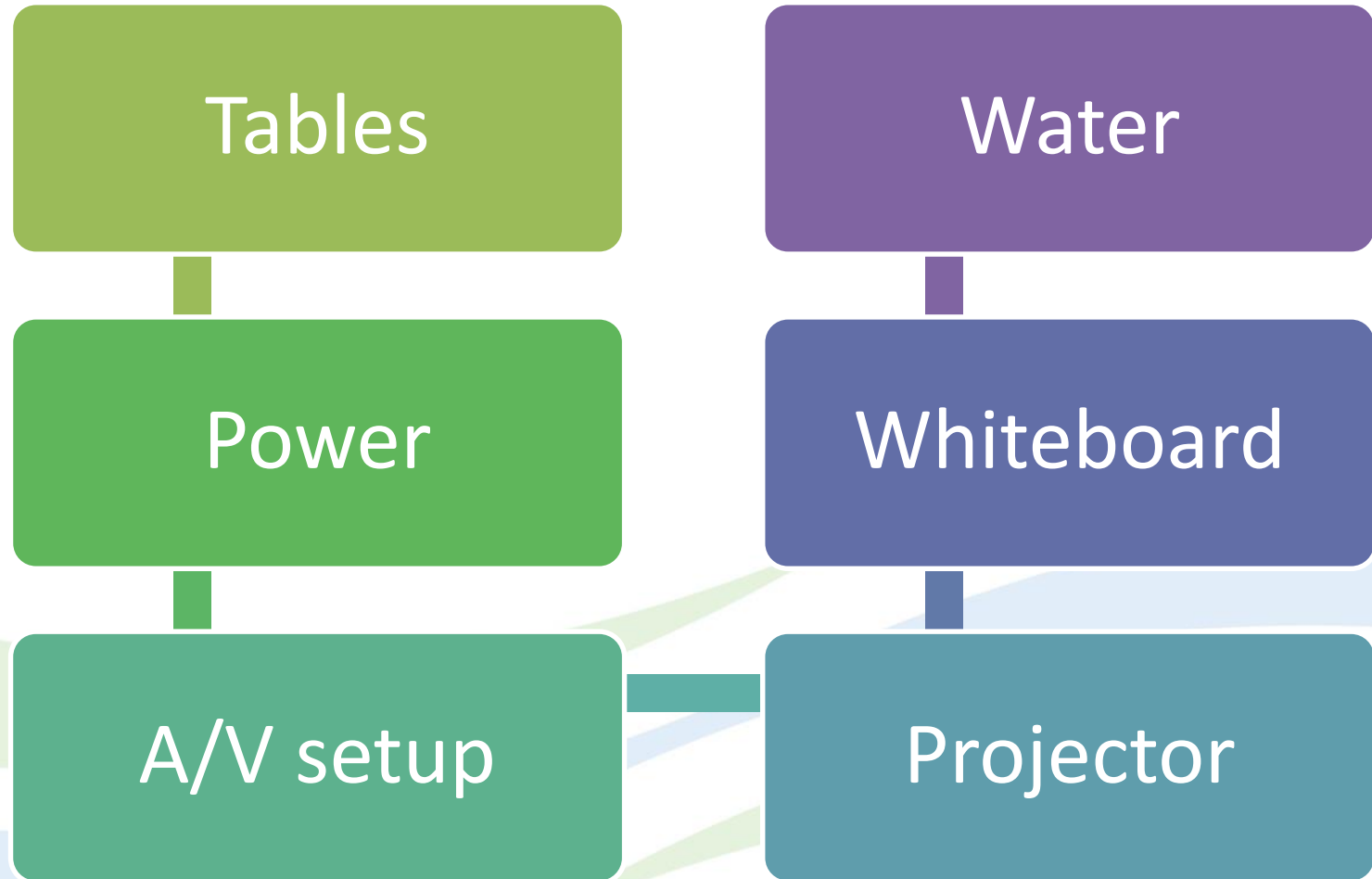


## 2. Setting up the Meeting Space

Good management is the art of making problems so interesting and their solutions so constructive that everyone wants to get to work and deal with them.

**Paul Hawken**

# The Basic Essentials



# The Extra Touches

Name tents

Welcoming message

Keepsake

Signage and visual aids

# Choosing a Physical Arrangement

Conference style seating



U-shape seating



T-Shape seating



Classroom style seating

# Electronic Options

Technological advancements provide effective ways of communicating and storing meeting information.

The conventional definition of management is getting work done through people, but real management is developing people through work.

**Agha Hasan  
Abedi**



# Overview of Choices Available

Presentation software

Web meeting

Video conference

Phone conference

# Things to Consider

Is the complexity of adding the technology outweighing the potential glitches?

Test and practice with the technology

Support from your IT department?

Are there any costs to consider?

# Making a Final Decision

Am I proficient with the technology?

Are the participants capable of using the technology?

Do you have the budget to support the technology?

# 3. Meeting Roles and Responsibilities

Do not follow where the path may lead. Go instead where there is no path and leave a trail.

**Harold R. McAlindon**

Role of the Chairperson, Minute Taker, and Attendees.

# The Chairperson

Remain fair  
with all  
participants

Start the  
meeting

Transition from  
agenda topic  
to the next

Handle  
disruptions

# The Minute Taker

Before

What to  
use?

Familiar  
with names

During

Attendance

Main ideas

After

Type the  
minutes

Proofread

# The Attendees



Prepare

Participate

Produce

## 4. Effective Chairing

There go the people. I must follow them for I am their leader.

**Alexandre Ledru-Rollin**



# Leaders or Managers?

Management is efficiency in climbing the ladder of success; leadership determines whether the ladder is leaning against the right wall.

**Stephen R. Covey**

# Getting Off on the Right Foot

**S**alutation and **I**ntroduction



**G**uests Mentioned and **N**eed-to-know



**A**genda, **L**aws of the meeting, and **S**egue

# The Role of the Agenda

The agenda communicates:

Meeting topics

Presenters

Time for each speaker

The agenda provides focus:

Meeting objectives

Outlining the meeting

Items to accomplish

# Using a Parking Lot



Describe how it works

Minute taker takes notes

Follow up communication will be sent

# Keeping the Meeting on Track

**S**et expectations

**T**ime the presenter

**O**vercome fear of interrupting

**P**olitely warn people time is  
nearing

# Dealing with Overtime

Warn attendees in advance



How much more time will be needed?



Give choices



# Holding Participants Accountable



Set your expectations

Clarify the consequences

Follow through

# 5. Dealing with Disruptions

There are only two words that will always lead you to success. Those words are yes and no. Undoubtedly, you've mastered saying yes. So start practicing saying no.

**Jack Canfield**



# Running in and Out

Set expectations

Incorporate  
frequent breaks

Timely feedback  
given to those who  
break the rules

# Cell Phone and Pagers Ringing

Put up a sign

Make an announcement

Place a reminder in the agenda

# Off on a Tangent

Engage the conversation

Acknowledge that the topic is valid and worthy of discussion

Redirect the participants back to the conversation

# Personality Conflict

Stop

- Stop the conflict by intervening

Drop

- Instruct the parties to drop the discussion

Roll

- Roll into a break

# 6. Taking Minutes

## Purpose and Content

# What are Minutes?



Major points

Decisions

Follow up actions

# What do I Record?

Date, time,  
and place

Action items

Attendees  
present

Non-resolved  
items

Next meeting  
items

# A Take-Home Template

Consistency



Saves time



Share it





# Sample Template

## Meeting Minutes Template

Name of Organization:

Goal/Purpose of Meeting:

Date/Time:

Chairperson:

Minute Taker:

Start time:

Topic	Discussion	Action	Person Responsible
1.			
2.			
3.			
4.			
5.			

# 7. Making the Most of Your Meeting

Meetings are sometimes perceived as boring events that people have to attend.

Incorporating various elements into your meeting can make your meetings more interesting.

*Greatness is not  
a function of  
circumstance.  
Greatness, it  
turns out, is  
largely a matter  
of conscious  
choice, and  
discipline.*

*- Jim Collins*

# The 50 Minute Meeting



Have an agenda

No side conversations

Summarize actions step

Send out summary notes

# Words from the Wise

**Ashleigh  
Brilliant**

- Our meetings are held to discuss many problems which would never arise if we held fewer meetings.

**Peter F.  
Drucker**

- Meetings are a symptom of bad organization. The fewer meetings the better.

**Wilbur Fisk**

- The individual, who is habitually tardy in meeting and appointment, will never be respected or successful in life.

# Thank you!