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Purpose.

Ideally, meetings should only be called where there is no other way to obtain the views or opinions of others in coming to a decision. There are many ways to reach a decision short of calling a meeting. These include:

- writing a note or memo
- using the telephone to canvas options/preferred approaches
- individual one-to-one discussions
- using e-mail/video conferencing to exchange thoughts/ideas

Although all of the above approaches can save both time and money (particularly where three or four people are sufficient to reach a satisfactory conclusion), if the issues are important enough to do a broader canvassing or if discussions are more usefully held with everyone in one room at the same time, a meeting can be the most effective solution. Of course, there are many different types of meetings, some of which are shown below.

Kinds of Meetings

There are many different kinds of meetings. Some of these are:

1. **Ordinary General Meeting:** Regular meetings of directors, boards, members, or committees, held weekly, monthly, etc.
2. **Ad-Hoc Committees:** Gathered together for a special purpose, and disbanded once objectives are achieved.
3. **Extraordinary General Meeting:** Called only when special circumstances arise.
4. **Advisory Committees:** Investigative groups that research and coordinate findings, and report and recommend.
5. **Brainstorming Groups:** Bouncing ideas back and forth, regardless of their validity, for later evaluation.
6. **Conference:** To consult, pool ideas, solve problems, change attitudes, or extend the level of expertise of participants.
7. **Executive Committees:** Usually a board of directors of top executives from various sections or departments.
8. **Forum:** Similar to a symposium, but includes an opportunity for the audience to ask questions of the speakers.
9. **Panel:** Group of experts assembled to discuss specific problems or issues.
10. **Seminar:** A conference of specialists for the purpose of discussion, research, or study.
11. **Sub-committees:** Appointed by a parent committee from among its members to research specific matters and report back to the parent committee.
12. **Symposium:** Where each person present delivers a prepared speech on an issue.
13. **Think-tank:** Undertaking intensive study and research into a specific area.
14. **Working Parties:** Meetings formed with people who have different areas of expertise, to investigate a problem or find the answer to questions.

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A good way to think about whether a meeting is a useful course of action to deal with an issue or situation is to use a simple checklist of the advantages and disadvantages of meetings. An example of such a list (to which other points can be added) is shown below.

The Good and Bad of a Meeting	
Advantages	Disadvantages
<p>A good meeting provides:</p> <ul style="list-style-type: none"> • the ability to listen to the views of many other people • the opportunity to openly clarify thoughts • the chance to brainstorm • the ability to hear ideas and build on them • the opportunity to resolve differences of opinion • the chance to combine skills and reach solutions • the opportunity to improve relationships • _____ • _____ • _____ • _____ 	<p>Bad meetings can often:</p> <ul style="list-style-type: none"> • lack clarity and purpose • meander/ramble and suffer from lack of structure • be poorly organized • be poorly run/facilitated • go on too long • contain hidden agendas • be irrelevant • lack action/follow up • _____ • _____ • _____ • _____

2 Preparation.

Our focus here is not on whether or not a meeting should take place at all, but we offer one simple way to determine this: do a quick cost vs. benefit calculation.

Once a meeting is selected as the best way forward, it is critical to think about the goals that you want to achieve. There are many general goals for meetings, including:

- **to satisfy statutory, regulatory goals (annual meetings, etc.)**
- **to introduce project reports and progress**
- **to share information**
- **to form new policies and procedures**
- **to test employee responses**
- **to dispel fears/squelch rumors**

However, goals can be much more specific. Perhaps a meeting is held to make a particular announcement to deal with a particular problem, or to quickly obtain ideas on a particular issue. It is the responsibility of the meeting leader to be clear about these goals, and this must also be done for daily, weekly, or monthly meetings where it is easy not to worry much about the purpose until everyone is in the room at the beginning of the meeting itself.

Once a meeting's goals are clear (and ideally written down), the next step is to decide what particular decisions need to be made during the proposed meeting. Such decisions will of course depend on the overall objectives. Issues that need to be decided on, like the goals, should be clearly specified in advance and put in written form.

Once the issues to be decided are identified, some essential people will be selected to attend (it might be difficult to make decisions without them, if this meeting concerns their area of responsibility). However, there will be other less-obvious people who can make effective contributions to your proposed meeting (as well as those who think they would!). In order not to waste the time of people who have little or no contribution to make, avoid duplication, and keep the meeting focused, follow this rule: Invite only relevant people to the decision-making process. In awareness-type meetings where decisions are often simple (such as deciding whether or not the information shared is clear or not), the group can be large, but it is usually best to keep the numbers down to a minimum.

Once all of the above planning steps have been completed, all the relevant people need to be advised of the meeting place and time. This is a simple step but one that is often badly executed. In addition, the meeting convenor needs to make sure that everyone is free to attend or at least to delegate someone who can make decisions on their behalf. Emphasize the five W's for checking:

- **where** the meeting is to be held
- **who** should attend
- **when** this meeting will start and finish
- **why** the meeting is being held
- **what** the meeting will address

You can even suggest to the attendees that they call or notify the meeting convenor if they cannot attend. This puts the onus on participants to plan to get to the meeting, nominate someone to attend in their place, or at least make their apologies if they cannot be there.

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An Effective Meeting: Preparation Sheet

Meeting title/focus: _____

QUESTIONS	RESPONSES
1. Is this meeting really necessary, or can we use another means to achieve the same ends?	
2. What goals do we specifically want to achieve?	
3. What particular decisions need to be made at the meeting?	
4. Who needs to be at the meeting?	
5. What type of meeting should be held (formal/informal, chaired or loosely facilitated)?	
6. What should be included on the agenda of the meeting?	
7. How long does this meeting need to last, at the maximum?	

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No matter how quickly a meeting is called or how short you think it can be, carefully consider what needs to be covered in the proposed meeting and how much time will be needed. The best way to do this is to prepare a precise agenda (even in rough form) that outlines the issues that need to be dealt with. In the initial draft, care should be taken not to include too much. A long agenda will inevitably lead to a long meeting where people might become bored or distracted, or lose interest. Your goal is to keep matters precise and targeted only on the critical issues that need attention.

Although there is no real rule of thumb about how long an agenda should be in its written form, there is a considerable amount of research to suggest that people react negatively to more than five or six items at one time. Even though this is not an exact science, it is common-sense advice: We quickly become distracted when we are asked to concentrate on many different subjects relentlessly presented in sequential order. Of course, this relates to significantly different issues, not related issues that can or should be grouped together under one heading. For example, “changes to start and finish times” and “future shift arrangements” can be grouped under a heading of “Working Hours.”

Example Meeting Agenda		
Meeting date: 9/23		
Proposed meeting start time: 9:45 a.m.		
MEETING PURPOSE/GOAL		
To update senior management on monthly performance.		
SUBJECT	WHO	TIME ALLOCATED
1 Meeting Opening	Chairperson	5 min.
2 Monthly performance results summary: <ul style="list-style-type: none"> • last month • year-to-date performance 	Maria	10 min.
3 Project progress reports: <ul style="list-style-type: none"> • Project A • Project B • Project C 		30 min.
4 Quality problems: <ul style="list-style-type: none"> • waste levels • re-work percentages • customer complaints 	John	10 min.
5 Marketing plans for product XYZ <ul style="list-style-type: none"> • domestic • overseas 	Sarah	10 min.
6 Any other business	All	10 min.
	TOTAL	1 hr. 15 min.
Notes: _____		

3 Opening.

Every single meeting should always **start on time**—a simple goal that is rarely achieved. Unfortunately, many meetings start late because a few people cannot seem to manage to get to the site at the stated time and the majority (more often than not) politely wait for them to arrive. In fact, most people almost expect the first 5 to 10 minutes to be wasted; some even bring along other work to do in the meantime. However, the end result is that the meeting gets off to a sloppy start. The only serious alternative is to start on time with the people who arrive when they should. Latecomers can apologize and catch up later. If there is any embarrassment, it can serve as a salient lesson to avoid this situation in the future.

To create an immediate focus on the agenda, the chairperson should ideally state the purpose of the meeting and then run through or read the agenda items. Given pre-circulation, there should be few surprises. However, in the event that people have questions or comments, this is the time for clarification.

Since the meeting will have a pre-set time frame, the chairperson should reiterate that the intent is to stick to the agenda and the time frame allocated. He or she might have to go over the ground rules of the meeting, which might include the following:

- **Every individual should be allowed to contribute and finish what they are saying without unnecessary interruption.**
- **Only one person should talk at one time. No private or side conversations should take place.**
- **The chairperson can call a halt to discussion on any issue at any time.**

Once the meeting goal, agenda, time frame, and ground rules have been stated and agreed upon, the specific decisions (if any) should be explicitly identified and feedback sought from the participants. For example, the chairperson might say, “At the end of this meeting, we all need to decide how quickly we can respond to the feedback we have just received from the survey. The goal is to take no longer than two weeks, but let’s see if we can achieve this or even do better than this if it’s possible.”

Of course, every meeting will have its problems (especially at the early stages), and these need to be managed. A few of the more common meeting problems are listed on the next page.



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10 Typical Meeting Problems

Problem	Ideas on how the problem could be handled
1. Bias The meeting chairperson or other individual defends the needs of one person much more than others at the meeting.	
2. Manipulation The chairperson does not allow facts to be presented or disputes information that is provided.	
3. Anger High emotion, aggressiveness, or anger is allowed to develop	
4. Excuses Meeting participants make excuses such as "I forgot" or "That was not my fault," etc.	
5. Ambush Meeting participants attempt to undermine the meeting so that it does not achieve its goals or outcomes.	
6. Indecision The chairperson or decision-maker does not lead the meeting when decisions or control is needed.	
7. Confrontation A meeting attendee adopts an unnecessarily negative or hostile attitude to views expressed at the meeting.	
8. Disorder Meeting attendees become loud, abusive, unruly, or argumentative.	
9. Lack of quorum The minimum number of participants needed to make a decision is not reached, and frustration builds.	
10. Walk-out A walk-out of one or more attendees occurs before the agenda is completed.	

4

Control.

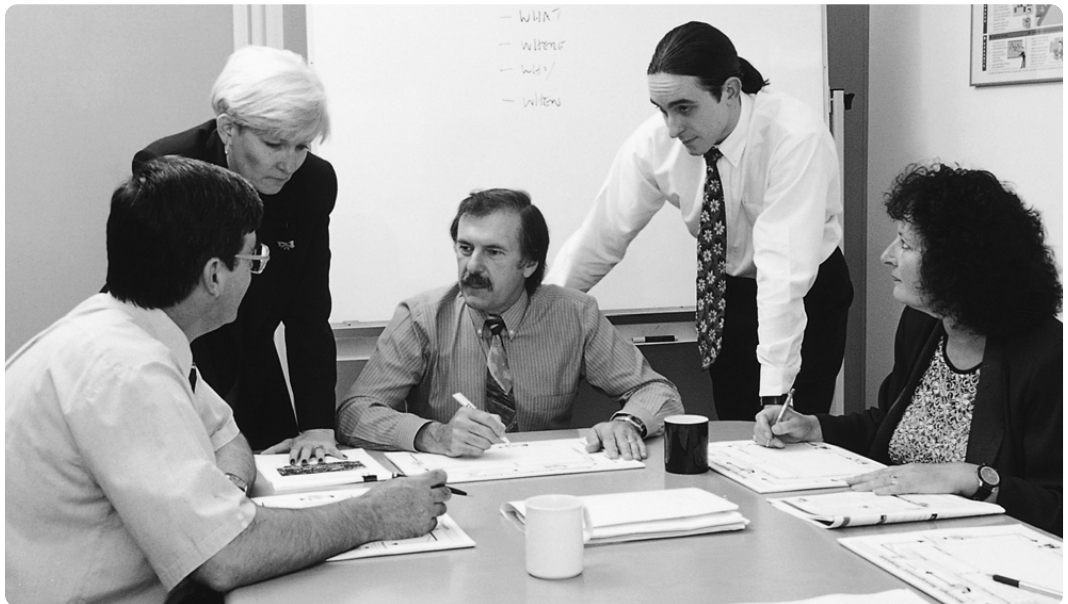
Many people arrive at a meeting with nothing to write on (a sure recipe for poor follow-through). Slightly more organized individuals bring a piece of paper and a pen. However, such loose preparations do not show that the individual is serious about:

- **noting important information**
- **recording actions or decisions (who is responsible and when)**
- **keeping their notes for future reference**

If a meeting is important enough for you to attend, it is critical that you take clear notes (in summary form) and use a structured format or notepad that can be filed or referred to later on. This will also help the whole group stay on-track and in control.

There are no useful guidelines about keeping meeting notes (unless you are specifically asked to take notes or minutes for later circulation). However, it is worth noting any major points and decisions that are made. This helps to remind you of actions that are likely to affect you when they are implemented and can serve as a record when the memory of what was said becomes vague or hazy.

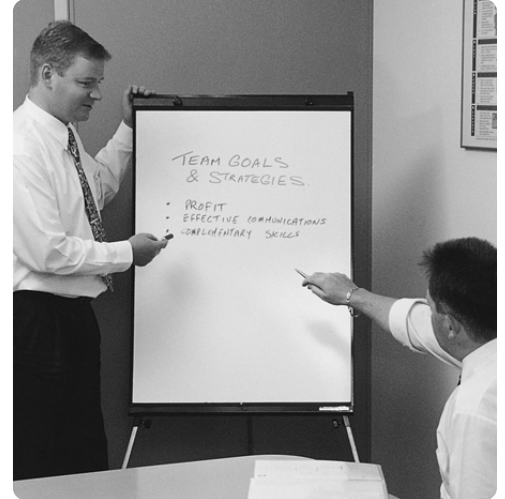
The action checklist on the back of this booklet is a structured format for your notes. It provides the basic steps for effective meeting management, but more importantly provides the space to record attendees, notes, responsible people for actions, and the date for completion. This template also serves as a reminder to the meeting facilitator that a structured process needs to be followed to get the best results.



5 Close.

Whether it is done by the meeting leader or someone else at the meeting, the most effective way to close a meeting is to do so strongly, outlining the actions that have been agreed to (do not let the meeting drift toward an inconclusive or unclear end). An ideal way to close strongly is to read through a set of notes aloud in summary form.

Reading summary notes aloud gives all the attendees the opportunity to check understanding and to make sure that they represent a complete summary and accurately reflect the meeting discussions. It is important to tie up any loose ends at this stage, including any decisions to defer discussions to a future meeting or to a later point.



Every meeting should add value and every meeting should have actions. A clear meeting protocol will help to control proceedings and close out issues firmly.

MEETING PROTOCOL

- | | |
|---|---|
| Pre-plan agenda: | Make sure that all attendees have been provided with a clear, simple agenda well in advance of the meeting. |
| Define roles of attendees: | Make sure attendees are aware of their role in attending the meeting. If there is no clear role for them, ask yourself why they need to attend. |
| Provide background: | Provide all attendees with background on the meeting's objective, to enable them to prepare for the meeting. |
| Set and observe a time contract: | Allocate contribution times well before the meeting and stick to them so that attendees can prepare their contribution. |
| State a clear objective: | Make sure attendees are aware of the purpose of the meeting ahead of time, and restate the objective at the beginning of the meeting. |
| Stay focused on the objective: | Don't let the meeting stray onto topics that are not on the agenda—keep in mind the matter at hand. |
| Practice active listening: | Listen to and consider everything that is being said. |
| Generate ideas: | Accept all ideas at face-value at first—brainstorm. |
| Be positive, build on ideas: | Examine all ideas for benefits/concerns. Then work on critical concerns, building on benefits. |
| Set action plan: | Agree on a plan of action by the conclusion of the meeting. |
| Record next steps: | Record all actions to be taken so that you can follow up at the next meeting. |

6 Action.

Most meetings will result in a few actions (and some a considerable number). Even though these should have been progressively recorded, it is worth confirming all of the actions that are expected to take place, as follows:

WHO (is responsible)?

WHAT (is to be done)?

HOW (is the action to be carried out)?

WHEN is the action to be completed?

One useful technique is to ask a silent meeting member to read this list back to the group. This allows such an individual to contribute and demonstrate that someone other than the meeting leader has recorded and understands what is to be done.

Before the meeting breaks up or side conversations start to develop, one final step you need to take for effective meetings is to make sure that follow-up plans or future meeting dates and times are agreed to. This includes assigning any sub-groups or sub-committees to handle specific issues. For example, the group might ask for a report on alternatives available before a decision is made. To keep the project focused but within the confines of the meeting, two or three people might be asked to meet once or twice before the main meeting comes together again.

These final action-planning steps are often very rushed because people want to leave or go to their next meeting. Try not to squeeze them into the last few minutes because this is one of the most important phases in a meeting. As much care should be taken as possible to complete this task properly and to leave no attendee in any doubt as to what should be done in the future. If this final step is done well, everyone is more likely to value the meeting and be willing to come to the next one!



