

## **Effective Meetings - Tips**

The following are some tips to help you make your next meeting successful, effective and maybe even fun.

### **Before The Meeting**

1. Define the purpose of the meeting.
2. Develop an agenda in cooperation with key participants. See a sample agenda.
3. Distribute the agenda and circulate background material, lengthy documents or articles prior to the meeting so members will be prepared and feel involved and up-to-date.
4. Choose an appropriate meeting time. Set a time limit and stick to it, if possible. Remember, members have other commitments. They will be more likely to attend meetings if you make them productive, predictable and as short as possible.
5. If possible, arrange the room so that members face each other, i.e., a circle or semi-circle. For large groups, try U-shaped rows.
6. Choose a location suitable to your group's size. Small rooms with too many people get stuffy and create tension. A larger room is more comfortable and encourages individual expression.
7. Use visual aids for interest (e.g., posters, diagrams, etc.). Post a large agenda up front to which members can refer.
8. Vary meeting places if possible to accommodate different members. Be sure everyone knows where and when the next meeting will be held.

### **During The Meeting**

1. Greet members and make them feel welcome, even late members when appropriate.
2. If possible, serve light refreshments; they are good icebreakers and make your members feel special and comfortable.
3. Start on time. End on time.
4. Review the agenda and set priorities for the meeting.
5. Stick to the agenda.
6. Encourage group discussion to get all points of view and ideas. You will have better quality decisions as well as highly motivated members; they will feel that attending meetings is worth their while.
7. Encourage feedback. Ideas, activities and commitment to the organization improve when members see their impact on the decision making process.

8. Keep conversation focused on the topic. Feel free to ask for only constructive and non- repetitive comments. Tactfully end discussions when they are getting nowhere or becoming destructive or unproductive.
9. Keep minutes of the meeting for future reference in case a question or problem arises.
10. As a leader, be a role model by listening, showing interest, appreciation and confidence in members. Admit mistakes.
11. Summarize agreements reached and end the meeting on a unifying or positive note. For example, have members volunteer thoughts of things they feel have been good or successful or reiterate the organization's mission.
12. Set a date, time and place for the next meeting.

### **After The Meeting**

1. Write up and distribute minutes within 3 or 4 days. Quick action reinforces importance of meeting and reduces errors of memory.
2. Discuss any problems during the meeting with other officers; come up with ways improvements can be made.
3. Follow-up on delegation decisions. See that all members understand and carry-out their responsibilities.
4. Give recognition and appreciation to excellent and timely progress.
5. Put unfinished business on the agenda for the next meeting.
6. Conduct a periodic evaluation of the meetings. Note any areas that can be analyzed and improved for more productive meetings. See a sample meeting evaluation.

And remember, effective meetings will keep them coming back!

## **MORE DETAILED IDEAS AND SUGGESTIONS**

### **Effective Meetings – Plan for Efficiency**

Despite predictions that the impact of technology in the workplace would reduce the need for meetings, it seems that meetings have started to consume an increasing proportion of the working day. As a result, organizations need staff that posses total meetings skills, including the ability to limit and shape the increasing demand for meetings.

Meetings often represent the most powerful and dramatic events in the workplace. When a meeting works well, the added value can be enormous. Conversely, meetings that give rise to poorly considered decisions and inappropriate follow-up actions will leverage this failure throughout the organization.

Each type of meeting should be carefully planned to achieve its specific objective.

If the main objective of the meeting is to inform people, then the meeting will usually involve some form of presentation followed by a question and answer session. This type of meeting should focus on the person presenting the information and the opportunity for discussion will often be limited.

If the meeting is held to solve a problem or brainstorm new ideas then everyone should be encouraged to participate from the outset. This kind of meeting should be relatively unstructured, and free flowing discussion should be encouraged. This will be helped by selecting the most appropriate venue and seating arrangement.

When meetings are successful they achieve an interchange between the participants in which they can achieve more than they could by working alone - or by communicating in some other way. However, when the outcome is evaluated objectively, many meetings are not successful and often leave the participants feeling that the meeting was a waste of time.

### **Effective Meetings – The Hidden Cost of Meetings**

Most people will have heard the story of the American corporate executive who had the hourly salaries of his senior board members entered into an electronic display, which updated the cost of each meeting as it progressed. The president would periodically turn to the display and ask the meeting participants if they had justified the accumulated cost. No doubt this was an effective way of keeping minds focused, but even that approach seriously underestimates the true cost of holding meetings.

Simple salary based calculations take no account of the other costs associated with a meeting. Here are some examples:

#### **Opportunity costs**

Whilst people are in meetings they are not able to carry out their normal duties. For example, a sales meeting may take a number of key sales staff off the road for a day. Sales opportunities will inevitably be missed and this needs to be considered when estimating the true cost of the meeting?

#### **Cost of Overruns**

Every meeting has associated with it a time and a cost – but how many half hour meetings actually last 30 minutes? Far more overrun than finish early, so even quantifying the time of the meeting isn't that easy.

#### **Preparation & Follow Up**

You would normally expect to spend some time ahead of a meeting - preparing for it. You would also spend some time following the meeting in pursuing tasks that have arisen from it. Typically, a meeting could occupy three to five times the scheduled duration of the meeting.

#### **Overhead and Administration costs**

This category includes the fixed costs of the meeting venue, whether it is in-house or external, as well as the cost of hiring any presentation equipment that may be required. It will include all of the communication and production costs associated with the meeting - items such as stationery, printing, telecommunications and postage. If the meeting uses videoconferencing, then this can be quite a significant cost.

#### **Travel costs**

People often travel quite long distances in order to attend meetings and not only must this cost be factored in, but also an appropriate allowance for any non-productive time.

## **Effective Meetings – Attending Fewer Meetings**

Learning to say "no" to unnecessary meetings should be an important part of your meetings strategy. It is only by declining to attend inappropriate or poorly planned meetings that you will find the time to prepare for and attend those that are of real value.

How often have you attended a meeting, only to find out that it involved nothing to it that couldn't have been dealt with via email or the telephone? How many meetings have you attended where your presence was entirely superfluous?

What about those meetings where you were put on the spot, and you wished you hadn't attended?

If you start to take responsibility for every meeting, whether you are chairing it or just attending, you will soon find that you are attending fewer and better meetings. You will become more specific about what it is that you want to accomplish and you'll be more focused on achieving a positive outcome.

If you decide that there are some meetings that you would either like to avoid or see restructured, then there are a variety of approaches that you can adopt. For example:

### **Ask for clarification of the objective**

If you ask the leader of a forthcoming meeting to clarify the meeting objective, this will encourage them to re-evaluate the best way that this might be achieved. You could also ask about other aspects of the proposed meeting: are the planned attendees the best group, is the timing right and is all relevant information available?

### **Identify the deficiencies**

If your main objection to a forthcoming meeting is that one or more aspects of it are missing or poorly planned, you should communicate this to the meeting leader. This is best done in a constructive working environment, where these comments are unlikely to cause insult or confusion. This strategy works well because it not only affects the meeting in question, but should result in better planned meetings in the future.

### **Question the need for your attendance**

This is easier to do if the meeting leader is your subordinate or a peer, rather than your boss. Where you wish to extricate yourself from a meeting called by your boss a good approach can be to couch your request in terms of an opportunity cost. For example, "Two other people from my section are already attending, so I think it would be a better use of my time to complete the plan for the new project, rather than attend this meeting". This couches your request in terms of an opportunity to complete another urgent task. Always make these requests from the team player perspective and stress the benefits, which should be in the best interests of your boss.

### **Simply be unavailable**

In some cases you will have other commitments that mean you cannot attend a meeting. You may choose to use this as a valid excuse for skipping a meeting. You may even distance yourself from the message by asking a secretary or colleague to communicate this on your behalf.

### **Try making your contribution on the telephone**

Calling the meeting leader to make your contribution ahead of the meeting may preclude the need for you to attend it. You may wish to follow this up with a written contribution that the leader can table on the day. This approach is can prove very useful if your involvement is superficial, for example if you are needed for your technical opinion in a fairly narrow

area.

Deciding which meetings to attend, or influence in some way, is best done in a considered and direct way. It is in everyone's best interest to attend effective and well-structured meetings. Remember, your time is your responsibility, if you decide that you should not attend a meeting, then take action to avoid it.

### **Effective Meetings – Establishing Your Objectives**

Many meetings are called and run on the basis that everybody knows what the goal of the meeting is. Don't assume that this is the case or that you all share a common purpose. Without a clear consensus about the goal of a meeting, the chance of success is minimal.

Generally speaking, the fewer tasks that are undertaken, the more successful the meeting is likely to be.

It is important to set measurable objectives prior to each meeting that you attend, especially if your role is that of chairperson. This gives you something to strive for during the meeting, and you will know when the meeting ends whether or not it has been successful. Some meetings will lend themselves to readily identifiable success criteria whereas others will not. For example:

#### **Presentation Meeting**

At a meeting designed to inform, the success criteria could be the amount of information imparted. However, this takes no account of the information that is actually received and understood by the attendees. In reality, this makes objective success criteria very difficult to establish.

#### **Sales Meeting**

In a final sales meeting where success is measured by getting the written order the criteria for success would be to secure an order. Failure to do so would normally indicate a failed meeting.

#### **Negotiation**

You would usually enter a negotiation with a checklist of things you would like to secure from the other side, together with a list of points you would be willing to concede. These represent objective criteria against which the meeting can be assessed.

If you are able to set measurable objectives, then share them with the meeting group. Set out a route for the meeting with clear milestones and then assess its success in achieving the objectives you set for it. Adopting this approach may convince you that a meeting is not always the right course of action, and you may find yourself calling fewer meetings.

### **Effective Meetings – Preparing Your Case**

Carry out some background research before the meeting, to help you to make an informed contribution. Sources of information may well include: colleagues who have worked in similar fields, research material and other relevant publications and notes or minutes from previous group meetings. Your research should include finding out whatever you can about the other attendees, for example their views and interests in the areas being discussed.

If your views are likely to meet strong resistance, try to identify your opponents and negotiate a compromise or at least an understanding in advance. This way neither party will be undermined in public and the atmosphere at the meeting can be kept positive.

Plan the content of any case you will present at a meeting around the message or messages you want to convey, in order to achieve your objective. It is important to keep the focus of your presentation on the message and not on the information and facts that underpin that message. This can be very difficult, especially when the message is supported by a multitude of facts that you think the audience should know.

If your presentation does consist of a series of facts and supporting evidence, then the audience is likely to assimilate these and draw their own conclusions. If this happens you will lose the opportunity to influence and shape audience interpretation. It is far more effective to communicate your messages and then support them with an adequate level of facts and information - so that your meeting partners can line them up behind the message you wish to convey.

### Effective Meetings - The Meeting Agenda

The meeting agenda has three distinct purposes. Firstly, it acts as a reference against which to prepare for a meeting. Secondly, it is a script for the meeting itself a mechanism for control and order. Finally, it represents a standard by which the meeting can be judged a success or failure.

It is often said that the person who controls the agenda controls the meeting. The agenda is often treated with almost legal reverence by those attending the meeting. When you are leading a meeting you owe it to yourself and your meeting partners to have prepared and circulated an agenda.

If you are asked to attend a meeting expect, or even request, an agenda. Attending a meeting with an unseen agenda could leave you vulnerable to an issue for which you are not prepared.

### Effective Meetings – The Meeting Agenda Illustrated

<b>Finance Committee Meeting</b> <sup>1</sup>	<b>Finance Committee Meeting</b> <sup>2</sup>
24 February 09.30 - 11.45 hrs Board Room	24 February 09.30 - 11.45 hrs Board Room
<ol style="list-style-type: none"> <li>1. Apologies for Absence</li> <li>2. Minutes of Last Meeting Approval of minutes of meeting of November 10, Minutes are attached.</li> <li>3. Chairpersons Remarks This will be an opportunity for a general discussion, report attached.</li> <li>4. Budget for Next Fiscal Year Action item. Next years budget was approved, in principle, by the Board at their January meeting. Action was then deferred pending receipt of a report on the research budget allocated to project Lazarus. A copy of this report is available to all meeting attendees from the Finance Secretary. Approval of the budget is being recommended.</li> </ol>	<ol style="list-style-type: none"> <li>5. Committee Reports               <ol style="list-style-type: none"> <li>(a) Ethics Committee : Action Item. The management summary from this report is attached, together with recommended actions. The full report is filed in the study room.</li> <li>(b) Planning Committee : Discussion Item. The management summary from this report is attached, together with recommended actions. The full report is filed in the study room. We are expecting to seek approval for this at the next meeting (May).</li> </ol> </li> <li>6. Any Other Business</li> <li>7. Adjournment</li> </ol>

The best way to ensure that those attending a meeting are clear about its purpose is to send them an agenda well in advance. The agenda should state which issues will be

discussed and in what order. It suggests the outline for the meeting minutes and to some extent predicts the results of the meeting. An agenda should be short, simple and clear.

The agenda should be headed with the date, time and location of the meeting.

The overall time should be shown on the agenda. In this example, the duration is indicated at the top; an alternative to this is to place a start time against each item on the agenda. It is important that an agenda displays the overall duration of the meeting as this enables participants to plan their day in advance. Furthermore it enables the chairperson to keep control of the meeting with reference to the published time-frame.

It is usual to number each item on the agenda and to formally introduce each one.

The apologies for absence, involves naming those who were invited but unable to attend.

Minutes of last meeting, this is a formal process, normally involving agreement followed by the chairpersons signature.

Specific headings are then given for each topic that needs to be addressed.

Any other business. Many organizations prefer to drop this item from agendas, restricting the meeting to specific items. The risk with including this option is that it can invite almost any point of discussion and meetings can drag on indefinitely.

Any relevant background information should be sent out with the agenda. Aim to make the agenda as informative as practical, it should encourage participants to turn up and play as full a role as possible. If the agenda is dull then the attendees are less likely to prepare well, or they may even decide not to turn up at all.

Remember, the key items discussed at the meeting are presented in the same order within the meeting minutes as was shown on the meeting Agenda.

### **Effective Meetings –Guidelines for Meeting Minutes**

The following is a guide to recording the minutes of a formal meeting:

Don't make the mistake of recording every single comment, but concentrate on getting the general meaning of the discussion and taking enough notes that you can summarize it later. Remember that minutes are the official record of what happened, not exactly what was said, at a meeting.

Make sure that all of the essential elements are noted, such as type of meeting, name of the organization, date and time, name of the chair or facilitator, main topics and the time of adjournment. For formal and corporate meetings include approval of previous minutes, and any relevant resolutions.

Prepare an outline based on the meeting agenda (see the content of Meeting Agenda on this website). Leave plenty of white space within the minutes for your notes. By having the topics already written down, you can jump right on to a new topic without pausing

Prepare a list of expected attendees and check off the names as people enter the room. Or, you can pass around an attendance sheet for everyone to sign as the meeting starts. The

degree of formality used here will reflect the significance of the meeting and it's future accountability.

To be sure about who said what, make a map of the seating arrangement, and make sure to ask for introductions of unfamiliar people.

Use whatever device is comfortable for you, a notepad, a laptop computer, a tape recorder, a steno pad or even shorthand. Many people routinely make an audio-recording of important meetings as a backup to their notes.

Be prepared! Study the issues to be discussed and ask a lot of questions ahead of time. If you have to fumble for understanding while you are making your notes, they may not make much sense to you later – when you need to type the minutes up.

Don't wait too long to type up the minutes. The key to producing an accurate record of the events is to record meeting discussion and decisions as soon as possible . Make sure that you have them approved by the chair or facilitator before distributing them to the meeting attendees.

Don't lose sight of the fact that this is an important task. You may be called upon many times to write meeting minutes, and the ability to produce concise, coherent minutes is widely admired and valued.

### Effective Meetings – Example Meeting Minutes

<p><b>Avon Sports Club - Meeting Minutes</b> <sup>1</sup> 24 February 7pm-8pm Clubhouse</p> <p>Present : Sally Scott, Di Wells, Helen Clarke, John Mills, Barrat Singh.</p> <p>1. Apologies for Absence were received from Sandy Taylor and Alison Jones.</p> <p>2. Minutes of the last meeting on January 8th were approved as a correct record.</p> <p>3. Junior Section Fundraising Activities. Sally Scott to arrange sponsored cycle. SS John Mills to organise spring BBQ. JM</p>	<p><b>Avon Sports Club - Meeting Minutes</b> <sup>2</sup> 24 February 7pm-8pm Clubhouse</p> <p>4. Sponsorship from Local Companies. It was agreed that local companies who have sponsored the club in the past should be approached with a view to sponsoring the club again this year. Di Wells to approach Novotek. DW Helen Clarke to approach C/JN Engineering. HC</p> <p>5. Any Other Business There was no other business.</p> <p>6. Date of next Meeting. The next meeting will take place on March 24th.</p>
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This illustrates the minutes of a routine sports club committee meeting, the entry level of what might be classed as a formal meeting. Minutes should always reflect the agenda. Note that the date and venue are listed. The names of the participants and absentees are recorded and the key items discussed are presented in the same order as shown on the meeting Agenda.

The final copy of the minutes should follow the same format as the agenda, even if items were discussed in a different order. There is often a set style for a given organization, which

enables the minutes of meetings to be filed and compared more easily.

The name, or initials, placed in an action column on the right hand side of the minutes can serve as a useful reminder to those who were allocated specific follow-up tasks during the course of the meeting.

### Effective Meetings – Example Meeting Minutes (Formal)

**Intranet Working Group - Draft Minutes**  
15 January 9am-10am

**ATTENDEES:**  
Bell - Jeremy Ironwork, Ian Fradgemousse, France Noveau  
CCTA - Sheila Legwell  
Industry Rep - Sarah Glass  
Micro-est - Larry Grayson  
SRCI - Gordon Gofer, Herbert Lecter (Chair), Trevor Hearn (Recorder), Pam King

**PURPOSE:** Review status reports from sub working group chairs.

**MEETING SUMMARY:**  
1. Minutes of meeting 12th December accepted.  
2. Each sub group chair provided a summary of progress since the last CISC meeting, these verbal reports have been documented in the attached progress report submitted by the chair at the CISC meeting on 5th January.  
3. There was general discussion on two items which are contentious in the planning group. These are also documented in the attached progress report. JI indicated he would raise the issues at the CISC meeting for steering committee direction.  
4. Confirmed next meeting is scheduled for 11th February.

**NEXT STEPS:**  
Meeting Schedule: 11 February, 11 March, 12 April  
All 3 meetings will be held by conference call at 9AM the dial-in number is 31133 788 9879.

**SUB GROUP INFORMATION:**  
Network Planning Sharon Legwell, CCTA      Technical Interface Tony Gibson, SRCI  
slegwell@inforamp.net 415-296-1024      tgibson@stentor.org.com 615-781-6330

### Effective Meetings – Formal Closure

When all items on the agenda have been discussed and agreed, the chair should sum up all of the items on the agenda. The follow-up actions should be reviewed, checking that nobody is allocated an unrealistic workload. It is a good idea to let everyone know that a summary action sheet will be produced and distributed, together with the full minutes of the meeting. This list should be distributed to all attendees and any others to which the activities relate.

The Chair should confirm that the person taking the minutes is happy with their record of events, then set the time and date for any subsequent meeting. The time to close the meeting has now arrived. The Chair should make any final remarks positive, forward-looking and brief - thank everyone for attending and emphasize the achievements of the meeting.

Once the minutes are complete and approved by the Chair, they should be distributed quickly to all relevant personnel (this will normally include all attendees of the meeting).

The minutes should show deadlines against any tasks as well as the person responsible for implementation.

The minutes should be distributed as soon as is practical, following the meeting.

There should be appropriate follow-up on the action items, between meetings and any items that merit special attention should be raised on the agenda for the next meeting.

At each meeting, approve the minutes of the previous meeting, and verify their accuracy with the attendees.

### **Effective Meetings – Recording Action Notes**

In many situations Action Notes can be a more practical option than taking minutes. Action notes are used to highlight future action, rather than past debate, so can be more effective, especially in the context of informal groups or social committees.

<b>Decision</b>	<b>Action</b>	<b>Who</b>	<b>By</b>
Proceed with quote if costs are less than 16,000	Obtain costs from production dept and circulate to all	Sarah Blake	Before next meeting
Discuss costs at the next meeting	Costs to be studied in advance	All	28th July

Action Notes don't record the narrative detail of who said what, but they should accurately record what was decided and represent a clear list of who has been tasked to do what. The use of either minutes or Action Notes should be agreed at the start of the meeting.

Action Notes can be summarized quickly as the meeting draws to a close, using a flipchart or similar device to re-iterate and confirm the individual commitments agreed.

Action Notes are most effective when they:

- Say enough, but just enough, to explain the point
- State clearly every decision that was made
- Identify who has agreed to do what, by when

They should be followed up in the same way as actions highlighted within minutes.