MAKING MEETINGS WORK: HOW TO PLAN ORGANIZE, CONDUCT PRODUCTIVE MEETINGS

PROGRAM OVERVIEW

About the Training Program

We live in a meeting society—a world made up of groups of people who come together for various lengths of time to solve problems, make decisions, get information, plan events, create policies and procedures, develop budgets, hire and fire, and for many other purposes. The reasons for holding meetings are almost as numerous as the number of hours spent in meetings. Research shows that the average individual in our society will sit through nine thousand hours of meetings in a lifetime—over 365 days—and that organizations spend thousands, sometimes millions, of dollars on meetings. Yet most people groan at the thought of attending another meeting! Why?

Because meetings are often mismanaged—they get off track, are interrupted, take too much time, have unclear agendas, and lack effective leadership. While most of us spend a great deal of time preparing for the work we do, we spend almost no time learning how to attend or conduct all of the meetings that accompany the process of getting our work done. In this one-day program, participants will learn how to plan, organize, and conduct productive meetings, including steps for preparation of a meeting, developing an agenda, encouraging participation, handling counterproductive behaviors, and planning action for follow-up.

Training Objectives

Participants will have the following opportunities:

• To learn how to plan and conduct meetings to maximize participation and achieve desired outcomes;

• To increase understanding of the differences between task and interpersonal issues in a group;

Designed by Jean R. Haskell.
- To develop an action plan for using effective meeting practices; and
- To build confidence in the use of effective meeting leadership practices.

## PROGRAM OUTLINE

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<tr>
<td>C. Finale</td>
<td>5 minutes</td>
<td>Game</td>
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**PROGRAM DIRECTIONS**

**I. Opening Activities**

**A. Overview (Presentation; Materials: Two Index Cards per Participant)**

1. Introduce yourself to the group, giving your name and something about yourself and your experience in teaching this program. Review the title of the program and ask the group members for three reasons why they think a program in how to conduct meetings is needed. (If this is an inside-company program, ask, “Why do we at this company need such a program?”) Take a few responses, then explain the rationale for the program “People spend thousands of hours in meetings, yet few of us know how to conduct meetings that are effective and enable us to accomplish our objectives.”

2. Present the *task* of the training program: To give meeting leaders an opportunity to learn how to plan and lead productive meetings.

3. Present the *desired outcomes* for the day (from the “Training Objectives”).

4. Explain the difference between *task* and *desired outcome*:
   - The task is the purpose of the meeting or the reason why the meeting is being held.
   - The desired outcome is the product or what it is that people will take away from the meeting.

Ask participants to reflect on a meeting they recently attended. Ask them to write, on one index card, the task, and on a second card, the desired outcome. Call on one
or two people to read out their cards. (It may become apparent that most of the meetings had a task, while few had a clear desired outcome.) Stress that it is important to have a desired outcome for every meeting.

**B. Your Meeting Experience (Icebreaker; Materials: One Sheet of Newsprint and a Marking Pen for Each Group of Four or Five)**

1. A group of four or five participants should be seated at a table. Ask them to meet together in their group, introduce themselves, stating name, occupation, and one non-work-related fact about themselves. Then display the list of questions below, with the title “Your Meeting Experience,” and ask participants to respond to the questions as a group. (They do not necessarily have to agree, so try to record all responses.)

Your Meeting Experience

a. What type of meetings do you conduct?
b. What is effective about your meetings?
c. What is ineffective about your meetings?
d. What are causes of the ineffectiveness?
e. What is the one thing you most want to gain from this program?

In presenting this activity, differentiate clearly between a task (to get acquainted, to review participants’ meeting experiences, and to develop a list of expectations) and desired outcomes (knowledge about who is at participants’ experiences at meetings, and a list of expectations for the course).

2. Have groups post their responses on newsprint and ask everyone to walk around and look over all the lists. As the reports are presented, comment on the diversity of types of meetings and reasons for effectiveness and ineffectiveness. Pay particular attention to question e, expectations, and review how you hope that this training program will meet them. Encourage participants to continue to be active learners—to take responsibility for their own learning, participate, ask questions, and take risks. Explain that there will be opportunities during the day to reflect on and write down their learnings and how they will be able to use them back home.

**C. Benefits and Costs of Meetings (Brainstorming)**

1. Ask groups to return to their table groups and (a) brainstorm a listing of the benefits and the costs of meetings and (b) prioritize and report out their three top benefits and costs.
2. Display the following list of benefits, indicating any additional benefits that were not listed by groups:

- belonging
- resource for new ideas
- commitment to ideas
- learning from each other
- building relationships by working together
- status
- ability to identify with outcomes
- commitment to action
- sense of mutual accomplishment
- fun

■ D. Content and Process (Guided Teaching; Materials: An Index Card for Each Participant)

1. Review the tasks that the groups have just completed and ask participants to write down on a card a number, from one to six, reflecting how they feel that their table group worked together to complete the tasks. Have a continuum line prepared on the flip chart, with the numbers from one to six—six being very positive and one being very negative—and statements that reflect possible responses for each number (e.g., “a marriage made in heaven,” and “like water and oil”). Tell groups to pass all cards to one person at each table and ask that person to read out the numbers to the whole group.

2. Comment on the data and then explain that every meeting, besides having a task and desired outcomes, can also be viewed as having two dimensions: **process** and **content**. Just as we need both of our arms to be in good working order and a plane needs both of its wings to fly, so a successful meeting needs as much or more attention paid to process as to content!

   - **Content** refers to what is talked about at the meeting, the agenda topics, information, opinions, decisions, action, plans, and the task of the meeting;
   - **Process** refers to how the meeting proceeds, how the group works together to accomplish the task and to build and maintain cohesiveness.

■ E. Introduction of Learning Journals (Writing Task; Materials: Form A)

1. Distribute Form A. Ask participants to reflect back on the group experiences that they have had thus far. Invite them to write down on Form A a few thoughts reflecting what they have learned at this point in the program.

2. Explain that active training is about taking part in activities that create opportunities to learn something new or to relearn something. In order to make the learning
“stick,” it is important to reflect on what was learned. Form A provides an opportunity to record those learnings.

3. Use the following example or make up your own:

   **Reflections on What I Learned:** When the instructor explained the difference between content and process, I realized that the reason I got irritated was related to the fact that the people in the group were not listening to one another, that we were not really working together to finish our task, and that we were paying attention to the content and not to the process. It would have helped if I had known how to ask the group about the process or about how we were working together.

### F. Five Keys to Leading Meetings (Lecturette)

1. Present this hypothetical scenario:

   Joe is very unhappy with the meetings he runs. He wants them to be productive, but they usually end with little actually accomplished. The problem, he thinks, is that the people coming to his meetings have big egos. As a result, within minutes, each meeting becomes an occasion for all the members to try to impress one another with their supposed humor and wisdom.

2. Ask participants to speculate on how Joe’s leadership of these meetings might contribute to their failure, in addition to the possibility that big egos interfere.

3. Indicate that, in your opinion, Joe needs to be introduced to the Five Keys to Leading Meetings:
   a. Planning
   b. Starting
   c. Focusing
   d. Facilitating
   e. Concluding

4. Make these points:
   - Each one of these keys is critical to the success of the meeting.
   - *Planning* is all of the things that must be done to prepare for the meeting.
   - *Starting* refers to how you set the tone and create the climate for the meeting.
   - *Focusing* means keeping the meeting on track.
   - *Facilitating* refers to the many things a leader can do to involve participants, be supportive, resolve conflict, and manage differences.
• Concluding is the way in which the leader ends the meeting to assure that participants feel satisfied with the outcome and that follow-up action will be carried out.

• Our task for today is to learn as much as we can about these five keys. Our desired outcome is that each person leave the training with confidence in his or her ability to use all five keys.

II. Planning A Meeting

A. How Do You Typically Plan a Meeting? (Full-Group Discussion)

1. Ask the large group, “How do you typically plan a meeting?” Give thirty seconds for reflection and then ask for hands.

2. Allow for several responses. After each participant speaks, he or she should call on another volunteer.

B. Nine Steps to Planning a Meeting (Lecturette)

1. Present the following “Nine Steps to Planning a Meeting”:
   1. Clarify the task of the meeting.
   2. Define the desired outcomes.
   3. Design the sequence of meeting activities.
   4. Determine who should attend, roles, and ground rules.
   5. Decide when to meet, when to end.
   6. Determine logistics, equipment, and administrative matters, and notify participants.
   7. Complete the agenda.
   8. Communicate the agenda to participants.
   9. Set up the meeting room.

2. Pair off participants and ask them to tell each other which of the steps they now use and those they neglect.

3. Reconvene the full groups and poll participants. Make these key points:
   • Thorough planning is critical to the success of a meeting.
   • Failing to plan is planning to fail.
• It is important to go through all of the steps.

Explain that initially these steps may seem like common sense, or tedious, as in learning any new skill or procedure. However, as the participants become accustomed to preparing for meetings in this way, following the steps will become automatic.

4. Explain that you will be spending time on all nine steps in greater detail.

C. Steps 1 and 2 (Lecturette, Writing Task; Materials: Form B)

1. Step 1: Clarify the Task of the Meeting

Key Point: The task statement is a one-line statement describing the primary activity or purpose of the meeting. The task statement starts with a verb. Give the following (or your own) examples of task statements:

• To decide the best way to approach our communication problem.

• To view the video of the training session.

• To hear the report on the conference.

Give examples of verbs that can be used in stating the task (to decide, to solve, to view, to hear, to inform, to negotiate, to listen, to review) and ask each group to brainstorm additional verbs. See which group can produce the longest list.

2. Step 2: Define Desired Outcomes

Key Points: The desired outcome describes the expected results of the meeting—the product that participants will take away with them when the meeting is over. It can be visible (a written plan) or not visible (new knowledge). It may include both task and process outcomes. It is written with nouns and phrases, not verbs.

Give examples of desired outcomes for both task and process (an action plan, a solution, a decision, clarity, an informed staff—task outcomes; a cooperative attitude, commitment, motivated team members—process outcomes) and ask each group to generate additional possibilities.

3. Distribute Form B. Ask participants to think about a meeting they will be leading in the near future and complete items 1 and 2 on Form B for that meeting. Invite them to discuss their plan with one other person at their table and give each other feedback on the clarity of the task and desired-outcome statements.
D. Steps 3 through 9 (Group Inquiry; Materials: Form C)

1. Distribute Form C. Ask participants to read steps 3 through 9 on Form C, noting anything they
   • do not understand,
   • do not agree with,
   • find strange or new, or
   • wonder why
   and write down questions. Challenge them to devise questions that will further their understanding of the planning steps.

2. When they have completed the task, ask them to discuss it at their tables; share information, agreements, and disagreements; and develop a group list of questions to be posed to you.

3. When groups have finished, take one question at a time from each group and respond, so that all questions are answered.

E. Completing the Meeting Plan (Writing Task; Materials: Form B)

1. Request participants to complete the meeting plan to the best of their ability on Form B.

2. Again, invite them to show their plan to the person with whom steps 1 and 2 were shared.

F. Learning Journal (Writing Task; Materials: Form A)

1. Ask participants to spend a few minutes making a Learning Journal entry on

2. If they seem to need another example of an entry, ask them to pay particular attention to how they wrote their task and desired-outcome statements and what they learned from that activity. For example:

   Reflections on What I Learned: The difference between a Task and a Desired Outcome; that the Task statement must always start with a verb, and the Desired Outcome is a noun. The difference seems clear to me.
III. Starting a Meeting

A. How to Start a Meeting (Demonstration)

1. Tell the group that you are now moving on to “Starting a Meeting.” Ask for five or six volunteers to meet with you at a “demonstration” table. Assign the rest of the group to observe particular aspects of the start-up—use of flip charts, clarity of task and desired outcomes, seating arrangement, presentation of agenda and ground rules, and designation of roles.

2. Demonstrate how to start a meeting. Select a topic that is relevant to the group or the organization (e.g., How to Have More Employee Involvement in this. Organization, How to Create a More Family-Oriented Work Environment, or How to Have More Active Training).

   Key behaviors to demonstrate:
   - Write on flip chart and post the task statement, desired outcomes, agenda, and ground rules. Begin by welcoming participants, then review flip charts or ask participants to review them.
   - Ask participants to perform various group functions or roles (e.g., take notes or keep time).
   - Ask for additions or changes to the agenda.

3. At the end of the demonstration, ask what was effective and not effective. To record the feedback, put a vertical line down the middle of a flip-chart page; put a plus at the top of the left-hand column, put a minus at the top of the right-hand column, and write the positives and negatives in appropriate columns.

B. Skill Practice (Role Play; Materials: Newsprint and Marking Pens for Each Participant, Form D)

1. Tell participants it is now their turn to practice starting a meeting. Distribute Form D. Divide the group into trios, making an effort to group people who have not been together at tables. Each trio member will now take a turn as “leader” by setting up and starting the meeting he or she worked on during “Planning a Meeting.”

2. Allocate time as follows: eight minutes for preparation of flip charts for the task, desired outcomes, agenda, and ground rules; three minutes for each leader to post the charts and set up the area; six minutes for the practice meeting, during which the other two members of the trio function as group members.
3. Following the practice, group members give the leader feedback, using Form D.

**C. Learning Journal (Writing Task; Materials: Form A)**

1. Ask participants to make an entry in their learning journals in the section on starting a meeting.
2. Suggest that they focus on the feedback just received.

**IV. Focusing and Facilitating**

**A. How to Focus (Read-and-Discuss Group; Materials: Form E, Index Cards)**

1. Refer to the “Your Meeting Experience” worksheet (which should still be taped to the wall) and review all of the reasons why meetings are not effective. The list will probably include such things as people go off on tangents, someone tries to dominate, people interrupt each other, and people bring up irrelevant subjects.
2. Make these key points:
   - One of the major problems in leading a meeting is keeping the meeting focused on the task.
   - There are many ways to assure that the meeting adheres to the agenda and to deal with irrelevancies, tangents, interruptions, etc.
3. Distribute Form E and ask participants to read it and to write down on a card something that they do not understand or want clarified. Then pair off participants to share their questions with each other. Ask partners to try to answer each other’s questions.
4. Field questions that remain after the pairs finish.

**B. How to Focus (continued) (Demonstration; Materials: Prepared Index Cards with Role Instructions)**

1. Select half of the group to be observers and ask the other half to be participants in a meeting.
2. Set up the meeting area with a table and chairs, telling participants that they are now in the continuation of the meeting that began earlier (in the first demonstration of starting a meeting) and remind them of the task and desired outcome for the meeting. Without being too obvious, give role cards to two or three members of the group. The role cards state disruptive behaviors, such as “Go off on a tangent,” “Bring up irrelevancies,” or “Be negative.” Directions on the role card state that the person receiving the role card must act out that behavior when the opportunity presents itself (or five minutes into the demonstration) and continue the behavior until the leader deals with it to the person’s satisfaction.

3. Conduct the demonstration, being sure to have your agenda (with time limits), ground rules, task statement, and desired outcomes taped to the wall and visible to everyone. Begin at the point where the start-up demonstration stopped, imagining that you have taken a short break and are now returning to the topic at hand.

4. During the demonstration, show these key behaviors:
   - Focus attention by using a flip chart to record the discussion.
   - Maintain a “bin list” of items that are brought up that are not relevant to the task or item being discussed.
   - Record all decisions and actions to be taken on the “Action Planning Worksheet.”
   - When the role players act out their roles, use the focusing techniques listed on Form E, reminding people of the ground rules: referring to the agenda, putting items on the bin list, etc.

5. When you have completed the demonstration, ask the observers to give feedback on what they saw that was effective or not effective.

■ C. How to Facilitate (Read-and-Teach Session; Materials: Form F, Index Cards)

1. Remind participants that the two sides of a meeting refer to content, the “what” of the meeting, and process, the “how” of the meeting, and that a meeting that gets results must attend to both aspects of the meeting.

2. Make this key point:
   A meeting leader must facilitate participant involvement, deal with conflict, manage differences, make sure that everyone is heard, keep communication open, and carry out many other tasks that will help participants to feel as if they can make a contribution to the meeting and that the meeting was worthwhile.

3. Distribute Form F and assign to each table group one of the four sections on the form. Ask the people at each table to read the assigned section and plan a way to
“teach” the rest of the group about that particular aspect of facilitating participant involvement. At this point, give each group the section of Form F assigned to it. Later distribute all pages of Form F to all participants.

4. Give the groups fifteen minutes to prepare their presentation and five minutes to present. While the groups are discussing and preparing their instructional design, make yourself available to respond to all questions that arise.

5. At the end of the planning time, ask each group to instruct the others. Ask participants to write questions on cards and hold them until all four groups have presented.

6. After the four learning experiences, ask participants to give feedback to the other groups by stating what worked really well and what could have used some improvement. Write their responses in plus and minus columns on the flip chart. Respond to and discuss any questions.

D. Learning Journal (Writing Task; Materials: Form A)

1. Once again, ask participants to make entries in their journals.

2. Remind them to consider their learnings about both focusing and facilitating.

III. Concluding a Meeting

A. How to Conclude (Demonstration; Materials: Index Cards)

1. Demonstrate how to conclude a meeting by starting to conclude your entire training program using these five steps:
   • Summarize what has been accomplished today.
   • Compare the accomplishments with the desired outcomes.
   • Identify unfinished business and suggest ways to address these issues.
   • Complete the action plan: who will do what and when (include suggestions for trying out new techniques and ideas, building a meeting support group, etc.).
   • Ask for feedback, verbal and written, on the content and process, using the following or similar questions:
     To what extent did we accomplish our desired outcomes?
     To what extent did we follow the ground rules?
     On a scale of one to six, with one being “not at all” and six being “completely,” indi-
cate the extent you feel that this meeting met your expectations. (Draw a range scale on the flip chart, ask people to answer the question on a card and pass the cards to you to be recorded on the scale; or ask people to call out a number and write the numbers on the scale.)

What did you like or not like about the meeting?
What helped or hindered us in accomplishing our task?
What can we do better at future meetings?
What are we learning about the way we operate as a team, committee, or task force?
What improvements can we make?

Thank people for their time and participation and state that the meeting is adjourned.

2. Ask participants to comment on what you just did.

Make these key points, if necessary:

• You have just completed the five steps for concluding a meeting.
• The conclusion of a meeting is almost as important as the planning. It provides a review of what has been accomplished and clarifies the follow-up action to be taken.

■ B. The Five Steps to Concluding a Meeting (Guided Teaching)

1. Show a list of the five steps (just demonstrated) to take when concluding a meeting and briefly review each step.

2. Ask participants to recall how you handled each step during the demonstration.

■ C. Learning Journal (Writing Task; Materials: Form A)

1. Ask participants to make entries in their learning journals.

2. Remind them to consider only their learnings for the concluding of a meeting.
VI. Closing Activities

A. What If? (Peer Consultation; Materials: One Index Card per Participant and a Hat)

1. Develop a quiz to challenge participants to recall facts, concepts, and procedures that they have learned. Play “Jeopardy” or another game to see which group can respond most quickly to the questions.

2. Then ask participants to recall the most difficult situation they have ever faced at a meeting and to write it on a card in the form of a question beginning with “What if?”

3. At each table, have participants put all cards in a hat and one person at each table pick a card. The table group must develop a response to the question. If the table group is stumped, you can consult with them.

4. Ask each small group to report the highlights of its discussion to the full group.

B. Now What? Action Planning (Full-Group Discussion; Materials: Form A)

1. Ask participants to take out their Learning Journals and read over the contents.

2. As a result of these reflections, ask them now to consider what actions they will take as a result of being in this training program. Request that they write these actions on the back of Form A. Ask them to report out, making a thirty-second statement, and to make a notation in their calendars to indicate when they will take this action.

C. Finale (Game)

1. Ask participants to raise their right hands high in the air.

2. Then tell them to put their right hands on their own left shoulders and pat themselves on the back for working so hard today. Thank them for their participation and wish them effective meetings.
Learning Journal

What I learned about:

Content and Process

Planning a Meeting
Starting a Meeting

Focusing and Facilitating

Concluding a Meeting
MAKING MEETINGS WORK
FORM B

Meeting Plan Worksheet

1. Task of the meeting

2. Desired outcomes for the meeting
   - Task
   - Group Building and Maintenance
3. Administration

- Meeting called by:

- Meeting place:

- Date of meeting:

- Starting time:

- Ending time:

- Participants:

4. Roles

- Leader:

- Timekeeper:

- Recorder:

- Chart person:

- Process observer:

Participant preparation:
5. Ground rules

6. Meeting room arrangement, equipment, supplies, refreshments.

7. Agenda:

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<th>Start time</th>
<th>Agenda topic</th>
<th>Desired results</th>
<th>Activity</th>
<th>Responsible person</th>
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Planning a Meeting (Steps 3 through 9)

Step 3. Design the Sequence of Meeting Activities

- Always plan an introduction and a summary to meetings.
- Use an icebreaker at the beginning of the meeting to warm up the group or during the meeting to generate energy.
- Sequence meeting topics using the following considerations:
  - High-priority before lower-priority topics.
  - Logical sequence—building information/discussions toward a conclusion.
  - Standardized sequences such as problem solving.
  - Alternating high-energy and low-energy topics.
  - Important topics when high energy is expected.
  - Encouraging participation and dialogue, by allowing subordinates to present first.
- Allow sufficient time for an ending.

Step 4. Determine Who Should Attend, Roles, and Ground Rules

WHO SHOULD ATTEND?

Essential

- Those with relevant information or expertise.
- Those who will make the final decision.
- People who are affected by or will carry out a decision.
- Anyone who might significantly prevent or interfere with the implementation of a decision.

Optional

- Individuals with higher functional responsibility.
- People with a general interest in the information or meeting outcomes.
- Members of staff or support who will be indirectly affected by the outcome.
- People with similar problems or work situations.

ROLES

Group roles or functions are those leadership tasks that can be shared by several people at the meeting. The tasks can be designated ahead of time and announced at the meeting, or the leader can call for volunteers at the beginning of the meeting.
Some suggested roles are:

- Designated leader: responsible for managing the meeting.
- Timekeeper: keeps track of time and reminds group of planned start and stop times for agenda items. Assists in maintaining meeting pace.
- Recorder: keeps a written record of the proceedings.
- Chart person: writes important points of discussion, lists of ideas, etc., on the chart. Assists by focusing group attention.
- Process observer: observes and makes comments about how the meeting is proceeding, often referring to the group’s observance of ground rules. Raises group’s awareness of how it is functioning in relation to accomplishing its objectives.
- Facilitator: may simultaneously fill the roles of timekeeper, chart person, and process observer; assists designated leader in accomplishing tasks and attending to group process.
- Navigator: keeps the group on track, noting if the discussion has strayed from the agenda.

GROUND RULES

Ground rules are guidelines for desired behavior that will enhance the process of the meeting and assist in accomplishing the task. They are standards that help clarify expectations regarding participation and can be used to control counterproductive behavior. Examples of ground rules are:

- Listen to the person who is talking.
- One person talks at a time, without interruption.
- Stay on track.
- No side conversations will occur.
- Be creative.
- Communicate directly and honestly.
- Hold questions until a person has finished speaking.
- Limit contributions to five minutes.

It is a good idea to ask the group to suggest additions to add to an initial listing of ground rules.

Step 5. Decide When to Meet, When to End

- Hold important decision-making/problem-solving meetings when people have high energy, preferably in the morning. Avoid Monday mornings and Friday afternoons as much as possible.
- Decide what time the meeting is to begin and what time it is to end.
- Set meeting length according to the agenda items, energy needed, time, and logistical constraints (car pools, airline flights, etc.). Energy usually drops after two
hours. Try not to exceed six hours, unless it is a meeting retreat with scheduled breaks.

- Set the meeting date for a day when all essential people and information are available. Allow adequate time for attendees to make preparations.
- Schedule ten-minute breaks every two hours.

Step 6. Determine Logistics, Equipment, and Administrative Matters, and Notify Participants

- **Meeting location** Choose a meeting room and facilities that best support your meeting task, desired outcomes, and activities. Favor a larger room for longer meetings, with movable chairs and tables, good ventilation, and lighting.
- **Room layout** Plan your arrangement of tables and chairs.
- **Equipment and supplies** Decide what audiovisual and other equipment you will need and supplies such as paper, pencils, name tents, name tags, markers, tape, overhead transparencies, etc.
- **Refreshments** While it is customary to serve coffee and rolls for a morning meeting and soda and cookies for an afternoon lift, too much caffeine and sugar can cause a subsequent drop in energy. Support participant energy levels by serving water, fresh fruit, fruit juice, cheese, crackers, low-sugar snacks, and decaffeinated drinks.
- **Notification** Inform participants about the date of the meeting as early as possible so they can mark their calendars. Let them know to expect more details about the meeting later.

Step 7. Complete the Agenda

- **Include an introduction, at the beginning and a summary at the end, allowing five to fifteen minutes for each.**
- **Note especially, and write out, the desired results you want for each agenda topic just as you would define desired outcomes for the meeting.**
- **You may elect to ask participants to add agenda items, if they wish. Be sure to assess the amount of time required for each item and note it when you record the agenda item.**
- **Write the agenda on a chart so all participants can see it during the meeting.**

Step 8. Communicate the Agenda to Participants Prior to the Meeting

As early as possible before the meeting date, send the written agenda to participants. Methods for this can vary:

- **Forwarding a copy of the completed Meeting Plan Worksheet.**
- **Sending date, start and end times, location, desired outcomes, and agenda.**
- **Electronic communication of one of these.**
A few days prior to the meeting, call each participant to make personal contact, confirm attendance, and share expectations with those for whom you have designated shared leadership roles.

**Step 9. Set Up the Meeting Room**

Arrange the meeting room to support accomplishing your desired outcomes and agenda activities. Vary the room layouts depending on the purpose of the meeting. Consider the following options:

- Set up theater-style seating with podium for one-way information meetings.
- Seat people so they can see one another for information-exchange meetings, problem solving, planning, or decision making.
- Disperse powerful or high-ranking people around the group.
- Disperse people who have various roles around the group, particularly if the group is fairly large.

Consider equipment and comfort:

- Be sure that overhead or slide projectors do not block vision.
- Attend to ventilation, lighting, room temperature, and noise.
- Be sure all other needed equipment is in place.
Observer Feedback: Starting a Meeting

To: _____________________________

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<tr>
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<th>Effective</th>
<th>Not Effective</th>
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<tbody>
<tr>
<td>1.</td>
<td>Welcomed and introduced people</td>
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<tr>
<td>2.</td>
<td>Stated the task</td>
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<td>3.</td>
<td>Stated and displayed the desired outcomes</td>
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<td>4.</td>
<td>Gave background</td>
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<td>5.</td>
<td>Reviewed or developed the agenda and displayed it</td>
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<td>6.</td>
<td>Clarified expectations</td>
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<td>7.</td>
<td>Listed or set ground rules and displayed them</td>
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<tr>
<td>8.</td>
<td>Clarified roles</td>
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MAKING MEETINGS WORK
FORM E

Focusing on the Task

Guidelines

1. Lead the meeting through the agenda. Take charge. It is your meeting. You are the
leader. Use a style of leadership appropriate to the task, the situation, and the willing-ness and ability of the participants. Delegate some focusing activities to those with shared leadership roles.

2. Introduce each agenda item. Cover time and desired results.

3. Keep the discussion on track by referring to the following structures:
   - Task
   - Desired outcomes
   - Agenda items
   - Ground rules
   - Roles
   - Time limits
   - Designed process for each agenda item (e.g., problem-solving steps or top-down flow chart)

4. To focus attention, use a chart pad and easel or other visual aids.

5. Maintain a “bin list” of important items not relevant to the present discussion.

6. At the end of each agenda item, briefly:
   - Summarize what was accomplished and/or decided.
   - Identify unfinished business and what to do.
   - Check for clarity and agreement.
Facilitating Participant Involvement

A. Promoting Participation

1. Specify *how you* want people to participate, indicating whether you want them to be active, giving ideas and feedback, asking questions, and offering support or whether you just want them to listen.

2. Encourage participation and clarity in any one or more of the following ways:
   - Get input from lower level people first.
   - Ask open-ended questions.
   - Use active listening to draw people out; paraphrase; be attentive.
   - Reinforce and acknowledge positive participation both verbally and nonverbally.
   - Ask for concrete examples.
   - Draw out people who have relevant expertise and those who are less involved.
   - Be supportive of new ideas, partial ideas, and minority views.
   - Distinguish assumptions from facts.
   - Use a structured activity: (1) Ask one speaker to call on the next speaker; (2) specify that no person may talk a second time until everyone has talked at least once; (3) use a soft ball and roll or throw it gently to those people who have not yet spoken; (4) break the group into small subgroups (of no more than four) and assign a task to each subgroup; or (5) create your own activity.

3. *Feel* supportive toward the group and you will act that way.
B. Attending to the Pace

1. It is normal for energy to wax and wane during a meeting, causing the pace to speed up or slow down. As leader, you can balance the pace of the meeting so people’s energy and interest remain relatively high throughout the meeting.

2. When the pace is too fast or too slow:
   - Make an observation about how you see the pace and ask the group if it agrees with you.
   - Test for completion of the agenda item.
   - Vary your own pace.
   - Break the group into small subgroups (if appropriate to the agenda) and assign a task to each group.
   - Poll the participants as to how they feel about the pace.
   - Take a break.
   - Take a stretch break in place.
   - Ventilate the meeting room.
C. Dealing with Counterproductive Behavior

1. Keep calm and feel assertive.

2. Use active listening techniques; paraphrase; summarize.

3. Look for the value of the input and acknowledge it.

4. Refer to ground rules, agenda, task, and/or desired outcomes and indicate that the behavior appears to be taking the group away from its task or is counter to the ground rules; or ask the person to describe how the behavior relates to the task at hand.

5. Use a “bin list” to record an irrelevant topic.

6. Describe the behavior and how it disrupts. Use an “I” statement: When you (keep interrupting), I feel (frustrated), because (we are trying to finish our task today).

7. Ask for cooperation and state what you want.

8. Interrupt the meeting to ask for process observations from the group (e.g., “How could this meeting be more effective?” or “How does [the counterproductive behavior] hinder or help this meeting?”).

9. As a last resort, discuss the behavior privately.
D. Managing Differences and Resolving Conflict

1. Encourage diverse views to improve quality and creativity.
2. Be sure that minority views are heard.
3. Focus on the idea rather than the person.
4. Suggest that each speaker paraphrase the previous speaker before presenting his or her own viewpoint.
5. Set aside a special meeting to deal directly with the conflict.
6. Learn and teach the group positive methods for resolving conflict or negotiating differences.
7. Use these steps for resolving conflict:
   • Define common ground, areas of agreement, common goals.
   • Isolate points of disagreement, asking each side to make clear statements and paraphrase everything that is said.
   • Brainstorm or research alternatives to reach agreed-on goals or common ground and diminish differences; allow sufficient time for alternatives to be generated and discussed.
   • Decide by accommodation, compromise, or consensus on suitable solutions and actions.
   • Plan for evaluation of ideas and/or solutions.
   • Refocus the meeting.