

Meeting Tips

Meeting purposes

Meetings come in all shapes and sizes, and for lots of purposes.

- giving information
- training
- discussion (leading to an objective)
- generating ideas
- planning
- workshops
- consulting and getting feedback
- finding solutions/solving problems
- crisis management
- performance reporting/assessment
- setting targets and objectives
- setting tasks and delegating
- making decisions
- conveying /clarifying policy issues
- team building
- motivating
- special subjects - guest speakers
- inter-departmental - process improvement

The acronym POSTAD TV helps to remember how to plan effective meetings, and particularly how to construct the meeting agenda, and then notify the meeting delegates: Priorities, Outcomes, Sequence, Timings, Agenda, Date, Time, Venue

Meeting Priorities

What is the meeting's purpose, or purposes?

- Always have a clear purpose; otherwise don't have a meeting.
- Decide the issues for inclusion in the meeting and their relative priority: importance and urgency - they are quite different and need treating in different ways.
- Important matters do not necessarily need to be resolved quickly.
- Urgent matters generally do not warrant a lot of discussion. Matters that are both urgent and important are clearly serious priorities that need careful planning and management.
- You can avoid the pressure for 'Any Other Business' at the end of the meeting if you circulate a draft agenda in advance of the meeting, and ask for any other items for consideration.

Meeting Outcomes

Decide the type of outcome (i.e., what is the purpose) for each issue, and put this on the agenda alongside the item heading. This is important as people need to know what is expected of them, and each item will be more productive with a clear aim at the outset.

Typical types of outcomes are:

- Decision
- Discussion
- Information
- Planning (eg workshop session)
- Generating ideas
- Getting feedback
- Finding solutions
- Agreeing (targets, budgets, aims, etc)

Meeting sequence

- Put the less important issues at the top of the agenda, not the bottom. If you put them on the bottom you may never get to them because you'll tend to spend all the time on the big issues.
- Ensure any urgent issues are placed up the agenda. Non-urgent items place down the agenda - if you are going to miss any you can more easily afford to miss these.
- Try to achieve a varied mix through the running order

Meeting timings (of agenda items)

- Consider the time required for the various items rather than habitually or arbitrarily decide the length of the meeting.
- Allocate a realistic time slot for each item. Keep the timings realistic - usually things take longer than you think.
- Keep to time.

Meeting attendees

- It's often obvious who should attend; but sometimes it isn't.
- Consider inviting representatives from other departments to your own department meetings - it will help their understanding of your issues, and your understanding of theirs.
- Having outside guests from internal and external suppliers.

Meeting date

- Ensure the date you choose causes minimum disruption for all concerned.
- For meetings that repeat on a regular basis the easiest way to set dates is to agree them in advance at the first meeting when everyone can commit there and then. Try to schedule a year's worth of meetings if possible, then you can circulate and publish the dates, which helps greatly to ensure people keep to them and that no other priorities encroach.
- Pre-plan meeting dates.
- Generally try to consult to get agreement of best meeting dates for everyone

Meeting time

- Times to start and finish depend on the type and duration of the meeting and the attendees' availability, but generally try to start early, or finish at the end of the working day.
- As with other aspects of the meeting arrangements, always ask people what they prefer.

Meeting venue

Many meetings are relatively informal, held in meeting rooms 'on-site'

Other aspects that you need to check;

- table and seating layout
- tables for demonstration items, paperwork, hand-outs, etc
- electricity power points and extensions
- heating and lighting controls
- projection and flip chart equipment positioning and correct operation
- whereabouts of toilets and emergency exits - fire drill
- confirm reception and catering arrangements
- back-up equipment contingency

Positioning of seating and tables is important. Ensure the layout is appropriate for the occasion:

- Small meetings for debate and discussion - board-room style - one rectangular table with chairman at one end.
- Relaxed team meetings for planning and creative sessions - lounge style, with easy chairs and coffee tables.

Meeting planner checklist (Appendix A)

There's a lot to remember, so you could use a meetings checklist:

Meeting agenda (Appendix B)

- Produce the meeting agenda.
- Include all the relevant information and circulate it in advance.
- Ask for additional items to be submitted for consideration.
- and then the main agenda, finishing with 'any other business'.
- For more common, informal meetings try to avoid the formality and concentrate on practicality.
- For each item, explain the purpose, and if a decision is required, say so. If it's a creative item, say so. If it's for information, say so.
- Put timings, or time-per-item, or both (having both is helpful for you as the chairman).
- If you have guest speakers or presenters for items, name them.

Running the meeting

- Stick to the agenda, work with each other, fairplay and concentrate on outcomes. Meetings must have a purpose. Every item must have a purpose. Remind yourself and the group of the required outcomes and steer the proceedings towards making progress.
- Take notes as you go, or allocate this role to someone else. Do not record everything word-for-word, record key points.
- Concentrate on achieving the outcomes you set the meeting when you drew up the agenda. Avoid racing away with decisions if your aim was simply discussion and involving people. Avoid hours of discussion if you simply need a decision. Avoid debate if you simply need to convey a policy issue. Policy is policy and that is that.
- Defer new issues to another time.
- If you don't know the answer say so - say that you'll get back to everyone with the answer, or append it to the meeting notes.
- Don't deviate from the agenda too much.

Meeting notes

- Do you want to take them or allocate this role?
- Meeting notes are essential for managing meeting actions and outcomes. They also cement agreements and clarify confusions.
- After the meeting, type the notes and circulate them straight away, copy to all attendees, including date of next meeting if applicable, and copy to anyone else who should see the notes.
- The notes should be brief or people won't read them, but they must still be precise and clear. Include relevant facts, figures, accountabilities, actions and timescales. Any agreed actions must be clearly described, with person or persons named responsible, with a deadline. Use the acronym SMART for any agreed action (Specific, Measurable, Agreed, Realistic, Timebound).
- The final crucial element is following up the agreed actions (your own included).

Meeting notes structure (Appendix C)

- Here is a simple structure for formal meeting notes involving a group of people within an organisation:
- Heading: for example - Notes of Management Meeting (if a one-off meeting to consider a specific issue then include purpose in the heading as appropriate)

Appendix A - Meeting planner

Meetings Checklist			
	done	comments	date/ref
Agenda			
Priorities			
Outcomes			
Sequence			
Timings			
Attendees			
Date			
Time			
Venue			
Variety			
Notification			
Notes of last meeting			
Directions/map			
Materials (as required by agenda items)			
Reference material for ad-hoc queries			
Results and performance data			
Equipment (make separate check-list)			
Electrical Power (if applicable)			
Domestics			
Catering arrangements			
Note-paper, pens, name-plates			
Refreshments			
Guest care/instructions			

Appendix B - Sample meeting agenda**(Meeting Title) Monthly Sales Meeting - New Co - Southern Region****(Venue, Time, Date) Conference Room, New Co, Newtown - 0900hrs Monday 09/05/04**

Agenda

Coffee available from 0830hrs - Dress is smart casual.

09:00	Warm up and introductions.	New starters Sue Smith and Ken Brown. Guests are Jane Green, Fleet Manager; Jim Long, Off-shore Product Manager; and Bill Sykes, Tech-range Chief Engineer.	15
09:15	Health and safety update.	Revised procedures for hazardous chemicals at Main Street production facility.	15
09:30	Product revision update.	Tech-range Model 3 now has stand-by mode control. Product will be demonstrated.	30
10:00	Coffee	Chance for hands-on the new Model 3.	15
10:15	Sales results & forecasts.	Ensure you bring qtr2 forecast data and be prepared to present prospect lists and activities.	60
11:15	New product launch.	The new Digi-range is launched in month five. Product demonstrations and presentation of performance data, USP's, benefits for key sectors, and details of launch promotion.	60
12:30	Major accounts initiatives.	Brainstorm session - How can we accelerate major accounts development in offshore sector? - Do some preparatory thinking about this please.	45

13:15	Lunch	Buffet in the meeting room.	45
14:00	New product launch.	The new Digi-range is launched in month five. Product demonstrations and presentation of performance data, USP's, benefits for key sectors, and details of launch promotion.	120
16:00	Coffee		30
16:30	New Company Car Scheme.	Presentation from Fleet Manager Jane Green about the new car scheme.	45
17:15	Awards and Incentive.	Qtr 1 Sales Awards and launch of Qtr 2 Sales Incentive.	45
18:00	Meeting review, questions, close.		30

Appendix C - Meeting notes template

<p>Heading: Date and Time: Venue: Present: Apologies for absence: In attendance:</p>	
<p>notes, agreements and actions (change item headings as applicable)</p>	<p>person responsible for each action agreed</p>
<ol style="list-style-type: none"> 1. Approval of previous meeting notes/minutes: 2. Matters arising: 3. Finance/financial performance 4. Sales 5. Marketing and Business Development 6. Operations or Divisional Activities 7. Manufacturing 8. Distribution 9. Environmental 10. Quality Assurance, etc 11. Human Resources 12. Projects 13. Communications and Team Briefing Core Brief 14. Any other business 15. Date of next meeting 	
<p>Time meeting finished:</p>	
<p>Signed and dated as a true record.....</p>	
<p>Writer's initials, file reference and date:</p>	