


Meeting Matters™

Briefcase Basics Workplace Leaders Vol. 1 Iss. 3

"Better meetings" — is this an oxymoron or is it really possible to come out of a meeting and say "That was good!" and mean it?

PHASE 1 – Pre-Meeting Design

Clearly identify the meeting purpose and then write this down as a Purpose Statement.

Design a Purpose Statement that:

- has a well defined objective (why is this meeting being held)
- itemizes some key process factors (e.g. promotes open and honest discussion, has the active involvement of all present, etc.)
- includes an expectation of results (e.g. all departments are committed to the project)
- identifies the type of meeting (information, discussion, working session, decision making, idea generation)
- determines who the participants are (consider those who need to know, are required for good input, are needed in order to get good dissemination of information etc.)

Then, prepare an agenda with:

- expected times allotted for each item including break times (I suggest a break every 2 hours)
- meeting location
- meeting length
- person responsible for initiating each agenda item.
- action to be taken on each agenda item (discuss, decide, consult etc.)

Once completed, circulate the agenda and Purpose Statement to all invited participants.

PHASE II – The Actual Meeting

Identify and clarify the roles of individuals in attendance.

- leader – prepares agenda, keeps discussion on track, leads the group through the agenda items
- time keeper – monitors the time schedule
- process leader – ensures that all are participating, opinions are being heard
- recorder – writes the key points of the discussion on flip charts

(some of these roles can be combined depending on the size and nature of the meeting but the leader must be separate from the recorder)

Start by reviewing the Purpose Statement and gain agreement from all present. Next agree on expected outcomes and review and upgrade (revise) agenda items.

Proceed through the agenda one item at a time; keep to the agreed upon time limits particularly the meeting ending time.

As you progress, record the key points on flip charts that can be posted on the walls so that all participants can be clear on the progress of the discussion.

Have a 'Bucket List' of issues that arise that may not fit the immediate discussion but do need some action or resolution. Record on a separate sheet and review periodically, particularly at the end, to ensure that these items are dealt with.

Also generate a separate "Path Forward" list that consists of the follow up items requiring further action that will need work outside this particular meeting. Assign *responsibilities* and *completion* dates for each item.

The assignee needs to be present in order to accept the responsibility and the authority to carry out the needed action.

Once agenda items are completed,

- review each item in summary form
- review items from "Bucket List"
- review, clarify, and agree on Path Forward list (with associated responsibilities and completion dates)
- determine need for a next meeting and schedule if required
- allow time for individual reflections whereby the leader asks each meeting participant for his (or hers) comments on whether or not the meeting accomplished it's purpose, as well as any other comments on process, location, length of time, etc.

Although all of the above may seem onerous, particularly the first time, once it is regularly put into practice it becomes second nature. The investment time is certainly worth the effort as the payoff of having more effective and efficient meetings can increase individual productivity and job satisfaction.

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