

Effective Meeting Management

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Meeting Management Process

Planning

Running

Facilitating

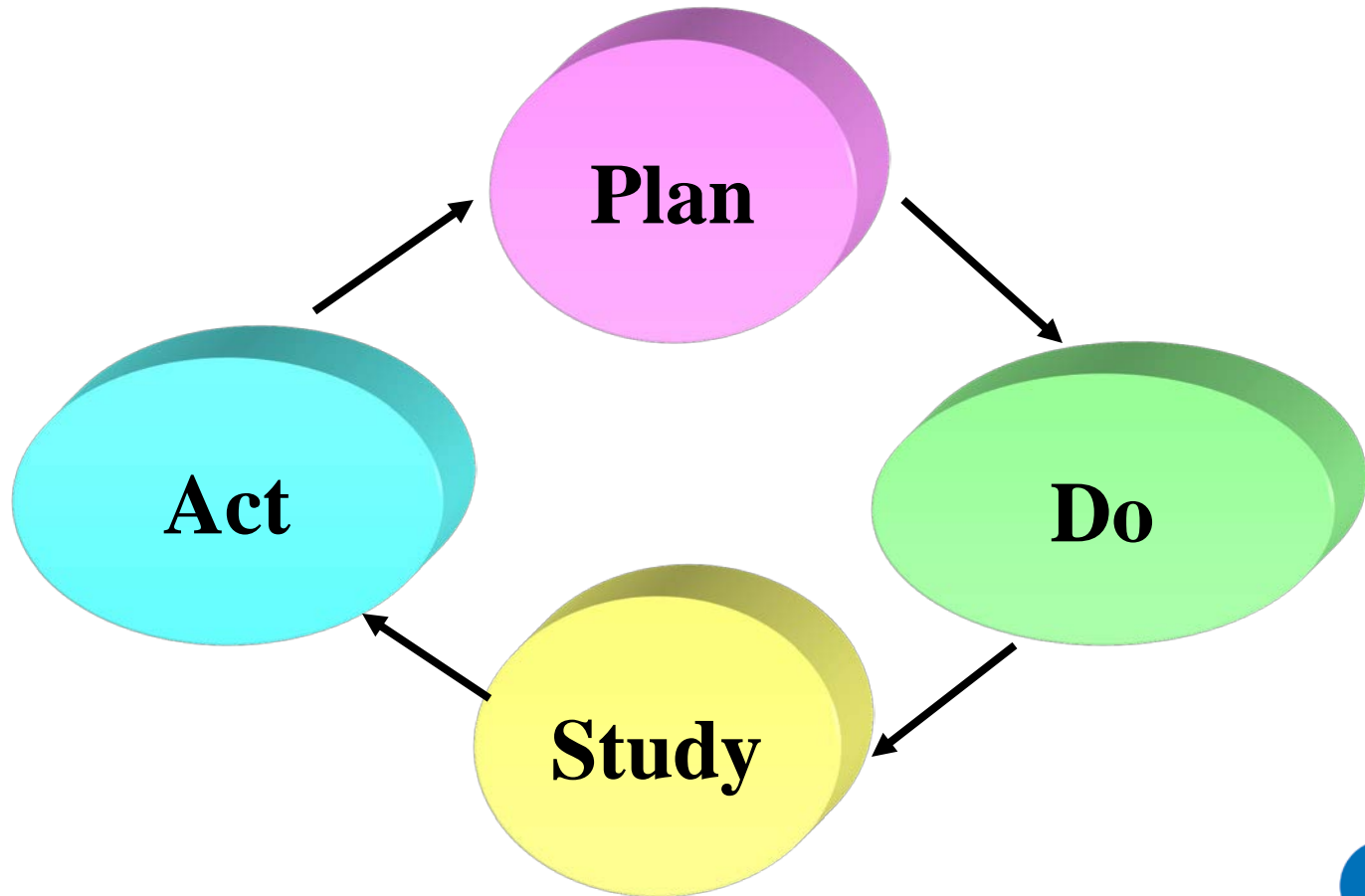
Follow-Up

Cost

Meeting Management Questions

- Should one call a meeting **Randomly**?
- Do you require a meeting **Agenda**?
- Should the meeting start **On Time**? **End on Time**?
- Do you think running a meeting requires **Preparation**?
- Why do you need a meeting **Facilitator**?
- Why to **Evaluate** the meeting?
- Do you think meetings are **Free**?

Effective Meetings - The Deming Cycle



Meeting Planning

Establish the **Need** for a meeting:

– **Why to have a meeting?**

- Looking for information from customers
- Understand customer needs
- Share your product/service information
- **Don't call a meeting when another method would work – memo, e-mail, or telephone call**
- **Question the need and frequency of meetings**

– **The Next Steps:**

- Define Purpose of the meeting (**P**)
- Define Agenda for the meeting (**A**)
- Define Time Limit for the meeting (**L**)

Meeting Planning

– **Appropriate Audience:**

- Who needs to attend?
- Include only the right participants who has something to contribute
- Inform the audience in advance with high-level agenda

– **Appropriate Roles for Attendees** (large group meeting):

- Assign a Scribe to take notes
- Assign a Facilitator to keep the meeting on track

– **Meeting Preparation (Critical):**

- Identify date, time, place, and equipment
- Gather relevant information
- Prepare meeting package with relevant information
- Send appropriate information in advance to all attendees
- Create Agenda with Meeting Purpose
- **Rule of Thumb – 1 hour meeting, 10 hours of preparation**

Running Meeting

- Discuss agreed upon **topics of the agenda**
- **Review Action Items** from previous Meeting as appropriate
- Listen to the customer/stakeholders and **understand their real needs**
- Capture all **action items** and review them at the end
- **Listen, listen, listen!**

Running Meeting

Virtual Meetings:

- Have a **quick introduction of all attendees with locations** announced
- Go over the **Ground Rules:**
 - ✓ Clarify protocol (one person speaks at a time)
 - ✓ When speaking announce your name
 - ✓ When not speaking keep your phone on mute to avoid call disturbance
 - ✓ **Do not dominate the conversation** – say your piece concisely and let others share their ideas (**Be Brief**)
 - ✓ **Conduct yourself as a business professional**

Meeting Facilitation

- **Draw out attendees to share their ideas skillfully**
- If facilitating, when one person is dominating the meeting, direct attention to other attendees
- Pay special attention to what **customers are really saying**
- Keep the meeting focused on the **objectives** and stay on the **meeting agenda**
- Facilitate discussion and agreement to keep things moving
- In a large group meeting, if you are the designated **scribe capture main items during the meeting**
- Reiterate key decisions and action items for common understanding – **must provide closure at the end**

Meeting Evaluation

- Always keep **5 minutes** at the end to do a quick evaluation of the meeting
- Ask **three simple questions**:
 - ✓ What worked well
 - ✓ What did not work well
 - ✓ What can be improved for a future meeting

Summarize all feedback and include with the Meeting Minutes for send out

Meeting Evaluation Form

Date _____

- 1). Things worked well today (use bullets):

- 2). Things did not work well today (use bullets):

- 3). Things need change for the subsequent meetings (use bullets):

Name _____

Meeting Follow-Up

Meeting Minutes/Notes (Meeting Summary):

- Capture meeting date, time and place
- Capture who attended the meeting
- Capture **key discussion points**
- Capture **key decisions reached**
- Capture **key action items (who, what ,when, etc.)**
- Put together **meeting notes** within **24-48 hours** of the meeting
- Include **meeting evaluation summary with meeting notes**
- **Keep meeting minutes brief and focused**
- Maximize email collaboration, document sharing, and **work between meetings**

Meeting Minutes Sample

Date:

Time:

Place:

Attendees:

Key Discussion (use bullets)

Key Decisions (use bullets):

Action Items (AI Table - AI #, Date opened, What, Who When):

Meeting Cost

- Attendees' salaries (pro-rated for meeting)
- Conference room or hotel space rental
- Gallons of coffee/tea consumed
- Food consumed – breakfast, lunch, or dinner
- Travel and lodging for attendees
- Do a **cost-benefit analysis** for a meeting (for hosting or for attending)
- **Loss of organizational productivity**
- **Adverse impact on work-life balance – wasted meeting time made up by staying late or taking work home**
- **Opportunity Cost – time spent in non-productive meetings could be used to work on customer and organizational issues**

Best Practice - Effective Meetings

Death By Meeting (Internal Meetings)

- Meetings are generally **boring**
- Meetings are generally **unproductive**
- Use appropriate Meeting types:
 - ✓ The Daily Check-in (huddle, **5 minutes**, standing up)
 - ✓ The Weekly Tactical (**90 minutes**, issues of immediate concern)
 - ✓ The Monthly Strategic (**3 hours**, few critical issues)
 - ✓ The Quarterly Off-Site Review (**1-2 days**, strategy, team, personnel, competition and industry)

Source: *Patrick Lencioni, **Death by Meeting**, 2004*

Tips for Effective Meetings

- **Avoid Time Waster Meetings:**
 - Make sure it's a working meeting.
 - Don't attend unless there is a set agenda.
 - **Can the problem be solved or decision reached without a meeting?**
 - Does the meeting have a set ending time?
- **Telephone Meetings:**
 - Keep calls short; stand during call – **treat calls as business meetings**
 - Start by announcing **goals** for the call
 - Don't put your feet up
 - Have something in view that you're waiting to get to next activity
 - **Keep smiling!**

Meeting Management Summary

Effective Meetings:

- Establish the **Need** for a meeting
- Define Purpose **(P)**
- Define Agenda **(A)**
- Set Limit **(L)**
- Invite **appropriate audience**
- Designate a Scribe & a Facilitator
- Conduct Meeting **Evaluation**
- Provide Quick **Meeting Summary** with key discussion and action items on a timely basis
- For effective meetings, need **Planning, Participation and Follow-up (PPF)**



Effective Meetings - Key References

- Lencioni, P. (2004), *Death by Meeting*, Jossey-Bass, San Francisco, CA.
- Morgan, N. (2006), *Running Meetings*, Harvard Business School Press, Boston, MA.

Special Thanks to Leaders...

- **Dr. G. N. Pandey**, VC, Arunachal University of Studies, Namsai, Arunachal Pradesh
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Upcoming Topics Schedule

Day/Date	Time IST	Topic
Friday, 26 June, 2015	9:00 am – 10:15 am	Leadership Excellence
Friday, 17 July, 2015	9:00 am – 10:15 am	Effective Teamwork
Friday, 21 August, 2015	9:00 am – 10:15 am	Effective Time Management
Friday, 18 September, 2015	9:00 am – 10:15 am	Effective Meeting Management
Friday, 2 October, 2015	9:00 am – 10:15 am	Effective Decision Making

Meeting YouTubes

<https://www.youtube.com/watch?v=xQW1fEwYZVA> 2.03 min – Meeting from Hell!



Thank You!

Any Questions?