

Lesson 5

Leading Meetings



Key Terms

agenda
attendee
conclude
facilitate

What You Will Learn to Do

- Prepare for a meeting

Linked Core Abilities

- Take responsibility for your actions and choices

Skills and Knowledge You Will Gain Along the Way

- Describe how to plan for a meeting
- Explain the general rules for leading and participating in effective meetings
- Define the key words contained in this lesson

Introduction

This lesson looks at five keys to leading meetings, the nine steps to planning a meeting, the general rules of leading effective meetings, and the skills to facilitate the process efficiently and effectively.

Many people dislike meetings. They are typically unorganized, and the purpose for the meeting is many times unclear. Attendees are unaware of their roles and their responsibilities. It does not need to be like that. This lesson provides you with the right information to conduct productive meetings. You are also given some sample tools that you can use when you are leading a project and expect to lead regular meetings with your project team.

Five Keys to Leading Meetings

In today's busy world, people just don't have time to sit in meetings that are unproductive and ineffective. It is important that the leader does not just call a meeting and then sit back to see what happens. He or she must do some preparation to determine the purpose and the outcome for the meeting. The following are the key elements of leading meetings. Each one of these elements is critical to the success of a meeting:

- **Planning.** Things that must be done to prepare for a meeting
- **Starting.** How you set the tone and create the climate for the meeting
- **Focusing.** How you keep the meeting on track
- **Facilitating.** Things a leader can do to involve participants, be supportive, resolve conflict, and manage differences
- **Concluding.** Way in which the leader ends the meeting and assures that the participants are satisfied with the outcome and they understand what is expected of them for follow-up actions

Planning the Meeting

How do you typically plan for a meeting? Thorough planning is critical to leading a successful meeting. There are nine sequential steps that can help you plan effectively:

1. Clarify purpose
2. Define outcomes
3. Sequence activities
4. Invite attendees
5. Schedule meeting
6. Prepare presentations
7. Create agenda
8. Communicate agenda
9. Prepare meeting room

These nine steps are covered in the following sections.

Clarify the Purpose of the Meeting

This is a short statement describing the primary purpose of the meeting. It should start with a verb (to decide, to solve, to view, to hear, to inform, to negotiate, to listen, to review).

Define the Outcome

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 a written plan or new knowledge. It may include both task and process outcomes. It is written with nouns and phrases, not verbs (an action plan, a solution, a decision, clarity, an informed staff are task outcomes; a cooperative attitude, commitment, motivated team members are process outcomes).

Sequence the Meeting Activities

It's important to design the sequence of meeting activities. Always plan an introduction and a summary to the meetings. Sequence the topics in order of priority, in logical sequence where information is needed to come to conclusions, alternate high-energy and low energy topics whenever possible, and allow sufficient time for closing.

Invite Meeting Attendees

Determine who should attend, their roles, and ground rules. Essential **attendees** are those with relevant information or expertise, those that will make the final decision, people who are affected by the decision, and anyone who might be a barrier to implementation. Group roles are those tasks that can be shared by several people at the meeting. Some suggested roles are the designated leader responsible for managing the meeting; timekeeper for keeping track of time and reminding group of planned start and stop times; recorder to keep minutes of the proceedings; process observer to observe behavior and make comments about how the meeting is proceeding and staying true to the ground rules; and a facilitator who may simultaneously fill the roles of timekeeper, chart person, and process observer. Ground rules are guidelines for desired behavior that will enhance the process of the meeting. Good ground rule examples include only one person at a time talks, listen to the person who is talking, no side conversations, communicate directly and honestly, and limit contributions to five minutes.

Schedule the Meeting

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. Energy usually drops after two hours. Schedule ten-minute breaks every two hours. Determine logistics, equipment and supplies required, and administrative matters. Administrative matters include meeting location, room layout, equipment usage, refreshments, and notification.

Key Note Term

attendee – a meeting participant

Prepare the Meeting Presentation

Select the appropriate military briefing format: information, decision, mission, or staff briefing. Research the topic. Obtain all available information, write detailed notes, and organize your thoughts. Determine the purpose of your briefing. Analyze your audience, evaluate your setting, and determine any time constraints. Plan the briefing. Refine your thesis statement, plan your major parts and sort them. Write a draft introduction and a draft conclusion. Rehearse your briefing as many times as possible. Revise the briefing. Focus on your audience's perspective. How will they receive your message? Do your facts validate your introduction, body, and conclusion? Review your style. Revise everything as necessary. Prepare your audio-visuals. Develop an effective method for answering questions. Be prepared to handle any problems which may surface during your briefing. Make printed copies of your presentation to give to all meeting participants.

Create the Agenda

Construct an agenda that can be accomplished within the scheduled time period. Prioritize topics and annotate any expected decisions. Establish timeframes for each topic. If possible, allow time for new business or unexpected topics toward the end of the meeting. Conclude each meeting by summarizing major decisions and reviewing assigned taskings.

Communicate the Agenda

Deliver copies of the agenda to meeting participants in advance. Allow sufficient time for participants to prepare for the meeting. Review the agenda at the outset of the meeting and reprioritize items as necessary. Follow the agenda and keep participants on time and on topic.

Prepare Meeting Room

Prepare the meeting room in advance (see Figure 4.5.1). Coordinate with protocol officers to ensure the room is properly prepared for high-ranking dignitaries. Check and verify all audiovisual equipment is functioning properly. Obtain presentation copies in advance and verify compatibility with audiovisual equipment. Assign seating positions and placename placards. Distribute printed materials around the table. Adjust the lighting and queue the presentations.

Initially these steps might seem like a lot of work and somewhat tedious; however, when you become comfortable with the steps you will find they will become automatic. When you see the positive results of leading effective meetings and reaching your desired outcomes, you will be admired by others because you will be showing you respect them by not wasting their time.

Starting the Meeting

How you start the meeting can set the tone for success. The following are activities that should be included in starting the meeting:

Figure 4.5.1: Plan your meeting carefully to make the best use of everyone's time.

Courtesy of CACI.



- Welcome and introductions
- Statement of the task
- Statement and display of the desired outcomes
- Background
- Review or develop the agenda and display it
- Clarify expectations
- List or set ground rules and display them
- Clarify roles

Focusing the Meeting

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 interruptions. Here are some guidelines you can use to keep the meeting on task.

Lead the meeting through the agenda. Take charge. Use a style of leadership appropriate to the task, the situation, and the willingness and ability of the participants. Introduce each agenda item. Cover time and desired results. Keep the discussion on track by referring to the following structures:

- Task
- Desired outcomes
- Agenda items
- Ground rules
- Roles
- Time limit

Focus attention by using a chart pad and easel or other visual aid. Maintain a “parking lot” of important items not relevant to the present discussion. At the end of the agenda item, briefly summarize what was accomplished and/or decided; identify unfinished business and what to do; and check for clarity and agreement.

Facilitating the Meeting

A meeting leader is responsible to **facilitate** participant involvement, deal with conflict, manage differences, make sure that everyone is heard, and keep communications open. The following are tips on how to encourage participation:

- **Get input from lower-level people first**
- **Ask open-ended questions**
- **Use active listening, paraphrase, and be attentive**
- **Acknowledge positive participation**
- **Allow opportunities for everyone to speak**
- **Be supportive of new ideas and minority views; seek first to understand before agreement or disagreement**
- **Distinguish the differences between assumptions and facts**

Concluding the Meeting

When the agenda has been completed it is time to put closure to the meeting. **Conclude** by first summarizing what has been accomplished during the meeting; then compare the accomplishments with the desired outcomes; identify unfinished business and suggest ways to address those issues; complete the action plan for agreed-on actions; evaluate the meeting for things you can do better at the next meeting.

General Meeting Rules

Conducting meetings is a process—a process of setting an agenda that will lead to a specific outcome. Like any process it can be improved through understanding the skills and rules of conducting an effective meeting. The best way to lead orderly, productive meetings is to follow these guidelines.

Meeting Agendas

Each meeting must have an **agenda**. It would be helpful if it was drafted at the previous meeting by one or two members. Putting detail in it prior to the actual meeting and, if possible, send it to the participants in advance; however, this would not occur at an initial meeting or a onetime meeting. If the agenda was not developed before a meeting, spend the first five or ten minutes to do so with the attendees.

Agendas should have the following information (following the what, where, when, who, and how method):

Key Note Term

facilitate – to encourage participation

Key Note Term

conclude – close the meeting by summarizing what was discussed and agreed

Key Note Term

agenda – schedule of items to be discussed at meeting addressing who, what, when, where, and how

- **Agenda topics (include a sentence that would define each item and why it is being discussed)**
- **Presenters for each topic**
- **Time allocation for each topic**
- **Type of action required (discussion, decision, announcement)**

The flow of the agenda will typically be as follows:

- **Warm-ups: short activities used to free the attendees minds of the things they left behind to attend this meeting**
- **Review of agenda so the team can add, delete, modify as needed**
- **Scheduling breaks if longer than one hour**
- **Meeting evaluation so the team can discuss their feelings about the topics covered; if a follow-up meeting is to occur, draft the next agenda**

Meeting Facilitator

Each meeting should have a facilitator who is responsible for keeping the meeting focused on its purpose and moving in accordance to the time allocations. The team leader normally takes this role; however, it can be assigned to any team member and rotated when several meetings are expected. The chief responsibilities of the facilitator are as follows:

- **Keep the discussion on topic and within the time allocated. When the time allocation is drawing near, inform the group so they can either adjust the time allocation at the expense of other items, postpone the discussion for another meeting or move on as scheduled.**
- **Intervene if there are sidebars or when there are multiple discussions going on at the same time.**
- **Ensure everyone is heard and no one person dominates the discussions.**
- **Bring discussion to a close with summary statements.**
- **Act as a scribe to record key subjects, decisions made, potential agenda items for subsequent meetings, and action items (who has agreed to do what and by when).**

At the end of the meeting, the facilitator will draft the agenda for the next meeting with the assistance by the team. Ensure the meeting evaluation takes place. This should include decisions on what will be done to improve the next meeting.

Keep the attendees in the “here and now.” Once the meeting begins, everyone is expected to give their full attention. Often meetings are held away from the everyday work place to ensure members are not distracted. Because this is not always possible, the “100-mile rule” is established (each member is to behave as if they were 100 miles away from their daily routine). If members continue to disrupt the meeting by receiving messages, making phone calls, and/or not returning on time from breaks, the facilitator may need to remind them of this rule.

Effective Discussions

Your meeting now has an agenda and a facilitator, and the meeting is underway. Another aspect of effective meetings is to facilitate effective discussions. Every meeting should include mechanisms that allow for open discussion. The following techniques are provided and can be used in meetings or whenever an effective discussion is desired:

- **If you are unclear about a topic, the comments of a participant, or the argument provided from another team member, ask for clarification. Ask them to repeat the information using examples, pictures, diagrams, data, or just other words.**
- **Don't let dominators take over the discussions. Make sure you ask those who have not had the opportunity to speak for their input. Be a gatekeeper and make opportunities for everyone to be heard.**
- **Before debating or defending each idea that is discussed, actively explore the idea and search for understanding before agreement or disagreement. Listening is not an easy thing to do.**
- **While listening, compile what has been said and then summarize and restate it to the group; ask if what was said was captured correctly.**
- **If the time allocation given to a topic seems to be taking longer, remind the team of the deadlines and either accelerate or postpone the time allocations.**
- **Learn to listen for when the topic has been "talked out." If there is silence, it could be just an opportunity for thinking about what was said. If someone repeats their point more than once, it could be that they felt they were not heard. Do not assume the discussion is over, but do not assume it is not. Intervene with questions like, "do we have anything else to add to this topic?" or "are we ready to move on?"**
- **Periodically check to how the team is feeling about the decision making process. Check to see if the team agrees with the position, decision, or summary of discussions.**
- **Throughout the meeting check the "pulse" for the outcome. Ask: "Are we getting what we want from this discussion? What can we do differently?"**

Record Keeping

The next step in the meeting process is to establish the record-keeping system for your meetings so you can refer back to decisions and agreements generated from the meetings. Such record keeping can prevent the rehashing of issues previously discussed. Agendas, minutes, and the actions are included in your record-keeping system.

Table 4.5.1 is a sample agenda for your use if you are leading a project and expect to have regular meetings with the project team. It is a good tool to use when you lead a service project. The agenda incorporates several elements useful in documenting the purpose for the meetings as well as action and future lists.

Table 4.5.1: Sample meeting agenda

Agenda for Project Team
<u>Project Team:</u>

<u>Goals:</u>

<u>Meeting Date:</u>

<u>Icebreaker.</u>

<u>Review the agenda: add or delete items as necessary. Estimate the amount of time for each item. Rank the item: must do today/should do today.</u>

<u>Status reports on individual assignments.</u>
<u>(List individual assignments and responsible person here.)</u>

<u>Other reports, presentations, activities or discussions.</u>
<u>(List them here identifying the item type, e.g., decision, discussion, action.)</u>

<u>Review of the status of the project: Where are we now relative to our plan?</u>

<u>Assignments for follow-up activities (What? By whom? Due date?)</u>

<u>Upcoming events, presentations, special meetings, etc.</u>

<u>Review of items on the action list.</u>

<u>Review of items of the future list.</u>

<u>Agenda items for the next regular meeting.</u>

<u>Special activity schedule for this meeting.</u>

The meeting minutes remind members of the topics discussed, the decisions made on those topics, the actions and responsible persons and due dates for those actions, and the list of future items to be included in subsequent agendas.

A sample of a two-part team meeting record is provided in Table 4.5.2 and can be used to capture the minutes of the meeting.

Table 4.5.2: Team Meeting Record

Project Team Meeting Record, Part 1		
Meeting Number	Date	Location
Project name		
Mission Statement:		
To indicate "present"		
Member	Future list: items for future consideration.	
Member		
Others attending:	Meeting review	
Agenda: Enter key words indicating the agenda topics. Check off an item when it is completed. Items not completed will be incorporated into the next meeting.	Pluses	Minuses

- | | |
|------------------------------------|--------------|
| () 1. Warm-up | |
| () 2. Agenda review | |
| () 3. | |
| () 4. | Next Meeting |
| () 5. | |
| () 6. | Date |
| () 7. | Time |
| () 8. Set agenda for next meeting | Location |
| () 9. Meeting evaluation | |

Project Team Meeting Record, Part 2

Topic 1: (brief description)

Decisions/Conclusions:

Next Steps:

Topic 2: (brief description)

Decisions/Conclusions:

Next Steps:

Topic 3: (brief description)

Decisions/Conclusions:

Next Steps:

Conclusion

In this lesson, you learned the five keys to leading meetings, the nine steps to planning a meeting, the general rules of leading effective meetings and the skills to facilitate the process efficiently and effectively.

In the following lesson, you will learn some important techniques for supervising others.

Lesson Review

1. List the five keys to leading effective meetings.
2. List the nine steps to planning an effective meeting.
3. What are some methods for facilitating effective discussions?
4. Consider the last meeting you attended. Was it effective? What would you do different?