Thomas Carlos Consulting

Conducting Effective Meetings

As a Project Manager, your experience tells you that “communications” (in various forms) consume a large portion of your time. “Meetings” are a common form of communication activity and in many instances, unavoidable.

I have worked with many individuals who appear to be “tied up in meetings” for most of their day. Many of these same people echo the sentiment of “that meeting was a waste of time.” This is an indication that the meetings were ill-planned, poorly run, and had no distinct purpose.

Given the fact that most people can view meetings as a negative event, you should be aware of the various activities required to conduct an effective meeting.

Part 1 – Develop your style and rules

Develop your style

Establish your personality: Even though you need to “take care of business” (and thus maintain order throughout this entire process), make sure you counterbalance this with the right blend of humor. Your personality should not be seen rigid or impenetrable by others.

Creating a “standard”; You must set a “standard” that will be met in the meeting. You should be consistent and set expectations as to how meetings will be conducted.

Develop your meeting rules

Roles and Responsibilities: Identify the role and responsibilities of team members and those who are attending the meeting. You should also set the tone for “who is in charge” (but do it subtlety).

Do not tolerate tardiness: Some people are habitually late. If this is the case, take them aside (after the meeting) and try to understand and correct the problem.

Never repeat agenda items: Why should you reward late comers by reviewing what has already been discussed? Conversely, why should you punish those who arrived on time by making them hear items already covered? Repeating agenda items not only cuts into valuable meeting time but it shows that you cannot control a meeting (and the participants).

Phone calls: Do not allow your participants to take phone calls during a meeting. Whether the phone rings, or vibrates, chances are that incoming calls will disrupt the meeting. And let’s not forget that while this attendee steps outside the room, they are not participating in the actual meeting and thus missing out on critical discussions.

Food, Refreshments, etc: Many consider food and refreshments as a thoughtful gesture, especially if the meeting is lengthy. But keep in mind that liquid spills, overturned food plates, and constant trips to the refreshment table can lead to disruptions. So if you plan on refreshments, perhaps you should add some pre-meeting time to the agenda for “refreshments and mingling.”

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Part 2 – Planning and Preparation

Planning

Define your goals and objectives for the meeting: A meeting without a "purpose" is a recipe for disaster. This is the most common reason for unproductive meetings. Make sure you define the purpose of the meeting and select agenda items that will help you achieve the desired results. You should also include the goals and objectives on the agenda (in the top section that contains meeting information).

Solicit agenda items: In addition to the agenda items you wish to cover, solicit input from team members and other stakeholders. Others will have valuable input to be shared and incorporate into your project.

- Make sure the agenda items chosen for discussion are relevant
- Coach the presenter and know what they will say (avoid surprises, that can be embarrassing)
- Make sure the agenda item can be discussed within the given time frame (and this includes open discussion and questions for the other attendees)
- Anticipate the results from the discussion (anticipate were the conversation will lead)

Select an appropriate room: Select a location that will accommodate your group comfortably. Make sure that everyone can see the white board or projection screen. Climate controls must be adjustable and working. Extreme heat or cold can lead to participants being uncomfortable and thus inattentive.

Determine the meeting length: Never forget that team members are busy and have other commitments. You should keep the meeting as short as possible. This will help ensure attention and will force you to "work the agenda" in a timely manner. Each agenda item should list the amount of time allocated for discussion.

Select the start and finish time: Select a time that works best for the majority of the meeting participants. Be careful when it comes to meetings that are scheduled for either 8:00am or 1:00pm. Chances are participants will use one of the following excuses for being late (or falling asleep).

- Too much traffic this morning
- I am not a morning person and thus not awake
- I was unable to return from lunch on time
- I ate too much for lunch and ready for a nap.

You should also be aware of finish times. Make sure you account for other meetings, lunch breaks, or the end of the work day.

Pre Meeting Activities

Prepare the agenda: Determine if you will use handouts or an electronic presentation (such as MS PowerPoint™). The meeting participants should have something to view during the meeting.

Agenda's can be prepared from the prior meeting's minutes. You can use one template and simply rename it. At first, it can be used as the Agenda. You then update that document and it becomes the meeting Minutes. You then clean out the entries and that document then serves as the baseline for your next agenda.

Memorize the agenda: As the meeting facilitator, you must know what is on the agenda, be familiar with the handouts, and be able to anticipate what could happen in the meeting.

Determine the invitee list: Unless you have a team that is required to attend every meeting, carefully examine who needs to be present and send them a meeting invitation.

Distribute the following items: Try sending these out well before the meeting.

- Minutes from prior meeting
- Agenda for this meeting
- Documents that will be reviewed during the meeting

Designate a note taker: Assigned the task of "note taker" to someone who can focus on recording the meeting and not have to worry about being a participant (and thus be strayed from their main objective). The note-taker must learn how to filter out non-critical discussion items versus key activities, action items, and decisions made.

Assign a time keeper: It's always a good idea to designate a time keeper- someone who will monitor the agenda and make sure you stay within the prescribed time frame for each agenda item.

Part 3 – Facilitate The Meeting

Leave space for late arrivals: Late arrivals are inevitable. It's always a good idea to leave available seating near the door so that late arrivals do not walk in and disrupt the meeting.

Start on time: This is the first step in maintaining control over the meeting. For every minute you start late, that is one less minute available to discuss agenda items. Do not assume that you can go beyond the designated "end time." Chances are that participants will have other meetings obligations that require their attendance.

Stay in control and maintain order during the meeting. It's your job to keep the meeting moving and make sure you cover agenda items during the allotted time. Therefore, you must learn how to do the following:

- Cut off disruptions, outbursts, or other disturbances
- Do not allow for multiple conversations – only one person has the floor at any given time
- Do not allow for incoming calls
- Cover agenda items only once
- Watch the clock and allotted time for each item. Do not allow for excessive conversation on an agenda item.
- Do not stray away from the main topics. Learn how to "park" items. Use a parking lot list for new items or those that need offline attention.

Stay positive and upbeat: Use your charm, whit, and personality to keep the meeting moving, informative, and fun. There is nothing worse than sitting through an hour (or more) of a boring and/or monotone presentation.

Work through the agenda: Address each item, line by line, and solicit discussion from the group. Make sure you address the item completely and ask for confirmation that everyone understands what has just been discussed before moving forward. Agenda items that cannot be resolved should be added to the parking list and discussed offline (or at a future meeting). Do not allow for one item to dominate the entire meeting and thus prevent you from addressing other agenda items. Your time keeper will help monitor and prevent this from happening.

Allow for input from participants: Make sure that you do not dominate the meeting by simply conveying information one-way. Meetings should be open and encourage input from all participants. They should feel comfortable in knowing their input is welcomed and appreciated. However, be cautious of antithetical contributions- those which consistently oppose viewpoints and are counterproductive to your discussion.

Usage of white board, flip charts or wall notes: Usage of these items can help meeting participants visualize ideas and stay focused. When the meeting ends, have someone gather these items and/or take digital photographs of the white board.

Create Subgroups: The meeting discussion can create situations were further attention must be given to a topic, issue, or risk. If this is the case, a may need to assemble a subgroup that will address the item and report back to the Project Manager or group. Make sure you document the creation of the subgroup in the Action Items section of the meeting minutes.

Review, Update, and Assign Action Items: Make sure that team members who are responsible for action items are aware of their responsibilities.

Allow for questions: Make sure you allow for questions and make sure you either answer them or add them to a list for future action.

Acknowledge your team members: Thank the meeting attendees for their participation and contributions to the meeting.

Summary and close: Highlight the most important items and make sure no one leaves the meeting feeling lost an unsure of what has been discussed during that session.

Part 4 – Post Meeting Activities

Review the meeting minutes: Follow these steps:

- Make sure the minutes are transcribed onto an official template
- Have your note taker clean up the minutes
- You must then review the minutes and change as needed
- Take your time and make sure the minutes are accurate.
- Ask trusted team members to review the minutes and offer input
- Be careful of sensitive information or injecting personal feelings into the minutes
- Do not distribute the minutes without proper vetting and review
- The meeting minutes are considered and must be filed with the “official” project documents

Distribute the minutes: Send a copy of your minutes to the meeting participants. Ask them to review the minutes and provide feedback if they see inaccuracies. Let the participants know that you are “open” to making changes. If available (and acceptable practice), you should publish the minutes on an Intranet or other media for public viewing.

Amending the “published” minutes: If you encounter a situation were someone on the distribution finds and error or omission in the minutes, do not be afraid to amend meeting minutes. Make sure the updated document contains the word “Amended” in the title.

Follow up on Action Items: Review the minutes periodically and make sure that action items are being addressed.

Ask for feedback: Ask meeting participants for feedback regarding the meeting. Their comments should also include specific feedback related to your ability to conduct the meeting and overall performance.

By following the steps and guidelines outlined in this document, your meetings will not only be productive but they will also be a source of (positive) team building activities.

About the author

***Tom Carlos** has over 20 years of cumulative experience in business, technical, and training environments. He is a Certified Project Management Professional (PMP) and member of the Sacramento Valley PMI Chapter. For other articles on similar subject, you can visit www.carlosconsulting.com or contact him at tom@carlosconsulting.com.*

Sample Meeting Agenda

Date:	**May 11, 2007**
Time:	**2:00pm – 3:30pm**
Location:	**Building A, Conference Room One**
Subject:	**Company Picnic**
Goals, Objectives	**Continue previous discussions and make decisions on open action items.**

Invited

☐ Tom Carlos, Project Manager	☐ Person 1, Note Taker	☐ Person 2, Time Keeper	☐ Person 3, Food Chair
☐ Person 4, Entertainment Chair	☐ Person 6, Team member	☐ Person 7, Team member	☐ Person 7, Team member

Introductions (5 minutes)

Documents Presented (5 minutes)

- Notes from May 4, 2007 Meeting
- Budget – Draft
- Entertainment Options
- Food Options

Discussion of Open Items from previous meeting (20 minutes)

- Finalizing the date of the event [Sue T., 10 minutes]
- Update on budget [Bill W., 10 minutes]

Discussion of New Items   (40 minutes)

- Review the entertainment options [Jenny R., 20 minutes]
- Review the food options [Mike P., 20 minutes]

Action Items (10 minutes)

Item #	Name - Description	Assigned to	Due Date	Status
1	Budget formulation, Finalize and approval from accounting.	Bill W.	May 11, 2007	Open
2	Entertainment, Present choices to group and finalize	Jenny R.	May 18, 2007	Open
3.	Food Options, Select Caterer, Entries, and service	Mike P.	May 25, 2007	Open

Questions (10 minutes)

Next Steps

- Work on event schedule
- Create risk and contingency plans
- Design invitations and guest list.