Middle East Region
Staff College

McDaniel College, Westminster, MD
6-13 June 2009

Planning & Conducting Meetings

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Planning and Conducting Meetings

Objectives:

X Why meetings are unproductive
X How to design a meeting
X How to conduct the meeting
X Using feedback from the meeting

Introduction

In this session, the words *meeting leader, meeting manager, group leader,* or *facilitator* will be used interchangeably to indicate the person responsible for conducting the meeting. The words *planning and design* will be used to indicate all the activities necessary prior to the meeting. For the purpose of our class, we will talk in the general context of a one-day meeting. The tools and techniques will apply whether we are conducting an hour-long meeting or one that will last a number of days.

Meetings are the fundamental way people get together as a group and the arena in which consensus decisions are often made. Traditionally, groups have worked face-to-face to work through their issues, make plans, create solutions, share information, and decide upcoming actions. Meeting have proliferated in recent years. People complain of spending their lives in meeting and never accomplishing any "real" work. However, meetings are still prevalent and as essential as ever, regardless of the number of poorly planned and executed meetings that exist.

What is happening here? Why are there so many meetings? Why are many of them still unproductive? Over the years, meetings have become an essential way for people to work together. Unfortunately, unless an organization has specifically targeted improving its meetings, poor meeting practices become a habit. In most cases people are not trained to conduct meetings. Most managers and supervisors were not trained to facilitate lively discussions, manage group processes, or help groups reach a consensus.

During recent years, there has been a move to involve employees and organization members more in planning and decision making – not because this is a nice thing to do, but because it is the best thing to do currently. Out of necessity, people come together in meetings. The more change there is in the world or in an organization, the more communication is needed and the more plans must be revised, revisited, and revamped. The more change there is, the more need there is for people to evaluate new processes, create new procedures, train in new systems, and react to new demands. The logical way to meet the demands of such change is to bring people together to discuss alternatives, decide the direction to take, and make plans to move forward.

The more change, the more meetings we seem to need! Even though we have phones, pagers, faxes, e-mail and the internet, sometimes the best way to work things through is to bring everyone together in a room to meet.

Training is needed more than ever to help organizations improve attitudes toward meetings and to improve meeting productivity by coaching and influencing groups. Here are a few rules of thumb for keeping meetings productive:

- X Meet only when it is essential;
- X Focus the meeting on a reasonable end result;
- X Give people assignments ahead of time, if necessary, to save time during the meeting;
- X Take time to design a meeting that involves everyone, keeps people focused, and maximizes the synergy and creativity of the group;
- X Make sure the right people are in attendance;
- X Begin and end on time;
- X Keep the group focused on the end result;
- X Leave some time for diversions and light socializing to help build an atmosphere of openness and trust (not to waste time);
- X Add some spice and variety with activities, visual aids, demonstrations, color, or a speaker;
- X Do not plan too long a meeting, as people may have other obligations.
- X If the meeting must be long, make sure people know its importance and make it worthwhile to attend; and
- X If the group comes to a roadblock in achieving its goals, offer the group the option of disbanding the meeting.

Overhead in a hotel lobby: "Business meetings are important. One reason is that they demonstrate how many people the company can operate without."

Planning

The "design" of a meeting refers to the objectives or goals of the session, the flow of activities, the breaks, the refreshments served (if any), the grouping and regrouping of participants, the opening and closing activities, and even the location of the meeting. The planning of a meeting requires certain steps. At the same time it is a creative process that may or may not always fall into place. Follow the ten steps below with some flexibility, allowing time for the creative process to work.

- X Define the purpose of the meeting.
- X Decide who will attend the meeting.
- X Diagnose the situation.
- X Write results- oriented meeting objectives.
- X Set the timing of the meeting.
- X Decide where the meeting will be held.
- X Decide whether pre-work is necessary.
- X Determine what processes will be used.
- X Choose opening and closing activities.
- X Assign responsibilities for arranging the meeting.

Purpose

"What will this meeting achieve?" "What do we need to accomplish at this meeting?" "What would happen if the meeting weren't held?" "Is the meeting really necessary?" "What tangible outcome or results will we aim for at this meeting?" In other words, what decision will have been made, what tangible product will everyone have (a plan, a decision, a list, a problem solved, a recommendation made)? Determine a product the group can walk away with, a list of action items, a priority list of problems, a plan, or a decision.

Attendance
In order to accomplish the meeting objectives, who must attend? This is a critical question to ask in designing a facilitation, because those who will be involved in authorizing and/or implementing the objective must be at the meeting.

Diagnose
The diagnose phase is often neglected by many people and will come back to haunt the meeting leader. Understanding a little about the group and organization can go a long way to ensuring an effective meeting. Here are a few questions you may need the answers to:

X How does this group fit into the overall organization?
X Have the group members worked together before? How well do they know one another?
X How long has the group been together?
X Describe the mix of people: levels in the organization; age distribution; ratio of women to men; cultural, ethnic, and/or educational backgrounds; length of time with the company.
X Who is responsible for the work of this group? Who outside the group is interested in the results?
X How well do group members get along/work together?
X Have any recent changes impacted the group and/or individuals in the group? How might these affect the goal of the meeting?
X What are group members likely to bring to the meeting? (Will people be hostile or accepting of the purpose of this meeting?)
X Is anything happening before or after the meeting that might affect the group members' behavior?
X If this meeting is wildly successful, what will happen?

Objectives
Many meetings lack momentum and direction because the agenda consists of only a list of topics to be discussed. The key to a meeting's success is to be clear about the purpose for discussing each topic. Is there a decision to be made? Information to be shared? Brainstorming needed? Approval desired? These ***outcomes*** then become the objectives of the meeting. The objectives are a powerful tool to keep the group focused and productive.

To write a clear, results-oriented meeting objective, first picture the outcome that will be achieved. Ask, "What will we end up with to demonstrate the results of the meeting – a plan, a decision, a recommendation, a brainstormed list, a set of criteria, a mission statement, a set of guidelines, a new policy?" Write the objective so that it describes what the group will be doing and the outcome. Use whatever words or phrases are needed to clarify the objective.

Timing

Determine the timing of the meeting – the length of the meeting and the best time to hold the meeting in light of the objectives and audience. Meetings frequently take longer than anticipated, sometimes because they are not managed well, and sometimes because there is insufficient time for discussion, idea generation, and decision making. Best guess is required and you will get better with practice and effort.

Where

The nature of some meetings requires participants to be away from work interruptions and in a more neutral atmosphere. Others require that people be accessible to the workplace. Many meetings simply must be held at the workplace to save time and money.

Pre-work?
Do meeting participant need to prepare for the meeting ahead of time? What can participants do before the meeting to save time at the meeting or make it more successful? What should members bring to the meeting? Does the meeting planner or leader need to gather information before the meeting?

Processes
This is the heart of design work. Know what processes work best for certain situations and select processes that meet the groups need for this given situation. Determine, given the stated objectives, what processes will help the group achieve them: brainstorming; a problem-solving model; small-group work; an informative presentation; a short training session; charts, diagrams, small-group reports?

Opening and Closing Activities
Opening and closing activities are important to group work. They bring the group together at the beginning and send it off at the end. They serve to solidify and unite people toward a common purpose. They frame the work of the meeting, give it value, recognize it, and even affect the group's productivity. The opening and closing activities are critical to a successful meeting, and skilled meeting leaders plan them carefully.

Arranging the Meeting
Delegate someone to actually arrange the meeting (notify participants, reserve a facility, order refreshments, assemble supplies). It is important to clarify these responsibilities and have them performed correctly and in a timely fashion. A well-planned meeting does not just happen. You will need to determine :

X Who will notify the participants and when
X Who will make arrangements for the meeting room/facility and the refreshments
X What supplies are needed. (Make a list of these: flip charts and paper, marking pens, overhead projector, masking tape, etc., and determine who will bring them to the meeting.)

Take nothing for granted. Be prepared and have the most productive meeting possible. Even the smallest thing can destroy hour of preparation.

Don't make meetings too long. "No more good must be attempted than the people can bear." … Thomas Jefferson

From Planning to Paper
There are a number of things you will have to produce to bring all the above elements together. I have attached to your notes a sample agenda and sample notes. In addition, you may need to produce flip charts (prepared before the session), overhead projector slides, computer presentations, and/or other visual aids and handouts. See the back of your notes for the sample agenda and sample notes.

If you were to plan your next meeting in this fashion, you would quickly determine you have far greater control, and people would find their meeting experience productive. For most of us, we would learn from the things we forgot, left out, or were surprised by. The time and energy investment on your part will be many times greater than present effort in preparing for a meeting, but your return from the meeting experience will be enhanced many times over. People respect people that are respectful of their time!

Conducting

The meeting leader plays a key role in making meeting successful. You will have to use many skills and techniques to keep the momentum going and help the group overcome any roadblocks. Explain the purpose and process of the meeting. Also explain the role that you will take during the meeting and coach group members in the roles they must take to make the meeting successful. After the group is focused on the purpose and process of the meeting, continually monitor the process.

Managing the process is the leader's key focus. Stay relaxed, letting the meeting flow at a natural pace, while staying alert and observing how the process is working. Achieve a balance between providing structure for the group and giving it freedom as well – freedom to listen to one another, to explore ideas and issues, to think through a problem, to brainstorm, and to come to know and trust one another.

The main responsibilities of the leader during the meeting can be summarized as follows:

- X Provide focus;
- X Provide structure;
- X Manage the meeting environment;
- X Manage disruptions and difficulties; and
- X Solicit feedback.

Focus

Make sure the objectives are results-oriented, the group understands the objectives, and they are written and posted in the room for everyone to see. Help the group leave the meeting with some tangible evidence of what it has accomplished: a decision made, plans developed, a list brainstormed, priorities set, or whatever the result.

"Nothing more effectively involves people, sustains credibility, or generates enthusiasm than face-to-face
communication. It is critical to provide and discuss all organization performance figures with all of our people." . . . Dana Corporation Philosophy

Structure

Provide structure by organizing a group session so there is a beginning, a middle, and an end. Design group sessions that meet predetermined objectives and maximize the interaction of group members. To do this, write brief, clear, and achievable objectives; plan an appropriate balance of presentation with group discussion and involvement; develop materials, and communicate clearly with participants about the planned structure of the session. Plan a structure, but be willing to deviate from it when necessary. The meeting will need to be creative; to achieve this it must be informal, discovery oriented, and flexible.

Beginning

The beginning of a meeting is crucial to its success because this is when people's attention is caught and when you focus the group. Include the following at the beginning of a meeting:

- X Welcome and introductions;
- X Icebreaker to ease the tension;
- X Goals and agenda announced and agreed on;
- X Roles explained (meeting leader, recorder, team leaders, etc.)
- X Administrative information disseminated (time the session will be over, plans for breaks and lunch/dinner, location of phones and rest rooms, other announcements).

The first few moments of a group meeting set the tone for the work to come. The beginning of the meeting really starts before people arrive. The group leader can do several things to set a positive tone:

- X Arrange the chairs so that people can see one another;
- X Post a "Welcome to . . ." on a flip chart where people can see it as they arrive;
- X Ascertain whether people already know one another;
- X Adjust planned introductions accordingly;
- X Greet people as they arrive;
- X Offer refreshments, if they are available;
- X Begin on time, checking to see whether everyone is ready to begin;
- X Introduce yourself, explain your role, and have others introduce themselves. Use an icebreaker, if one is planned;
- X (optional – for longer meetings) Ask each person their expectations for the meeting.
- X (optional) Post a list of suggested ground rules and ask everyone if they understand and agree with the rules. This is helpful if some or all of the attendees are not familiar working together or new to the meeting sessions.

A challenge to the group leader will be how to balance productivity with some informality and relaxation.

Two managers were talking: "Let's cut the staff meeting today." "We can't. I need the sleep."

The Middle

The middle portion of a meeting is when the real work is accomplished. There is no set way to structure this portion of the meeting. It is usually a working session to accomplish goals and work through an agenda, which may include discussions, short presentations, small group work, large group work, summaries, and various activities to accomplish the goals, such as brainstorming, prioritization, diagraming, listing, sorting, or evaluating. Because this is the longest portion of the meeting, it is helpful to provide breaks and a variety of activities. Some general guidelines for designing activities follow:

- X Allow time for discussion and transitions.
- X Take frequent breaks.
- X Provide variety. Vary the type of activities, break large groups into small groups, provide opportunity for people to stand up and move around, vary the pace, and vary the intensity.
- X Stay focused
- X Be flexible. If a particular process is not working, adapt it to meet the needs of the group. It may be necessary to give the group a break while revising the plans.

The End

The ending of a session is as important as the middle or the beginning. At the end of the session, decisions and actions are clarified and reviewed, and the group feels a sense of completion and looks to the future. The end of a meeting does not end the work of the group; it keeps the work going forward. The end of the meeting is really the beginning of the group's next task. The way a session ends may make the difference in whether anything is truly accomplished. Therefore, be clear about what needs to happen at the end of the sessions and plan enough time to end the meeting well.

The group should not leave until the following has been accomplished:

- X All decisions recorded and agreed upon by the group;
- X All upcoming action items recorded and agreed upon by the group, with dates and the name of the person responsible for each;
- X The date, time, and place for the group's next meeting established, or someone is appointed to schedule it;
- X The meeting reviewed and evaluated with one or two areas for improvement targeted;
- X Important agenda items for the next meeting listed;
- X Expectations reviewed
- X Decisions made as to what to do with the flip charts (transcribe as minutes, transcribe only some, bring to next meeting, etc.)
- X Obtain feedback from participants on how the meeting went.

Environment Considerations

- X Meeting Environment –Room selection, surroundings, and room arrangement.
- X Lighting
- X Temperature
- X Noise levels
- X Space
- X Location
- X Setup
- X Breakout space

Disruptions
Your role is to maintain equilibrium in the group and to deal with disruptions in a way that minimizes their negative impact on group productivity. Some of these you will be confronted with are: meetings that do not start on time, latecomers, keeping everybody there, dealing with people who have to leave, beepers, phones, messages for attendees, comments for some that raises questions unrelated to the goals — the list goes on and on. In most cases, you should use common sense in dealing with disruptions, but above all do use diplomacy to avoid any negative impact in correcting or handling a negative situation.

Feedback
It is important to acquire feedback from the group during and after the meeting. Feedback helps group members learn ways to make their meetings more effective as well. A short written survey can be conducted during a longer meeting, followed by a brief discussion of what changes need to made in the process. Two or three questions will suffice, or a rating scale could be used. Feedback can be an excellent development tool for you and the group — use it!

Summary
The purpose of going through this session is to help put an end to the typical complaints of "I spend my life in meetings!" or "How can I get anything done when I'm in meeting after meeting all day long!". By putting energy into planning and designing a meeting, by knowing to set clear goals and objectives that provide focus on obtaining tangible results, and by paying attention to the numerous details we have covered, you will be responsible for providing effective, productive meetings that actually obtains results. These guidelines are good for an hour-long meeting or a meeting lasting several days.

Sample Outline for Meeting Leader

Team Building Session
June 25, 2003

OBJECTIVES FOR THE SESSION
- X Become better acquainted with one another;
- X Increase your knowledge of teammates' jobs and roles;
- X Understand how each person's job relates to overall team goals;
- X Clarify and discuss individual and subteam responsibilities, and create a Team Responsibility Matrix; and
- X Identify opportunities for creased effectiveness as a group.

OUTLINE

8:00 a.m.	Welcome and Introductions Icebreaker: Paired interviews
8:45	Departmental history, goals, and future direction
10:00	Break
10:15	Introduction to Team Building Session and to "Roles"
11:00	Individual exercise: Role Clarification
11:20	Small-group role discussions and feedback (in mixed subteams)
12:00	Lunch
12:45	Subteams meet to: Discuss roles as in above exercise; and List major responsibilities of the subteam on a matrix chart.
1:30	Everyone mills around room to: Read other subteams' lists; and Write comments on blank paper next to each list.
1:45	Subteams reconvene, read comments, and revise lists
2:15	Break
2:30	Subteams report to large group
2:45	Complete Responsibility Matrix Work in large group or subteams – whatever process will be the most productive and beneficial. Add team members' names to chart posted on wall. Indicate those individuals who: X Have primary responsibility X Have secondary responsibility X Must approve decisions
4:15	Wrap-up discussion

- X Areas that need further clarification or discussion.
- X Opportunities for increased effectiveness.

X		Determine action items and persons responsible.
X		Round-robin feedback on how the session went.
5:00	Adjourn.	

Sample Notes for Team-Building Session

Team Building Session
Notes

OBJECTIVES FOR THE SESSION
X Become better acquainted with one another;
X Increase your knowledge of teammates' jobs and roles;
X Understand how each person's job relates to overall team goals;
X Clarify and discuss individual and subteam responsibilities, and create a Team Responsibility Matrix; and
X Identify opportunities for creased effectiveness as a group.

Time: 7 ½ hours

MATERIALS NEEDED
X Two flip-chart easels with paper (preferably with one-inch blue grids)
X Water-based marking pens in several colors, in two sizes: large for writing on flip charts and medium point for the opening exercise and for the comments exercise.
X White correction fluid
X Masking tape (or other method to hang flip-chart paper on walls)
X Scissors
X Scotch tape

HANDOUTS
X Role Clarification Activity
X Instructions for small group work
X Sample Responsibility Matrix

FLIP CHARTS
One prepared flip chart for each of the following:
X Goals
X Agenda
X Norms
X Drawing of matrix and how to construct it

ACTIVITIES
8:00 a.m. Welcome and Introductions
Exercise: Pared interviews using stars

1. Hand out one sheet of blank paper and two to three medium-point marking pens to each person. Have each person draw a large star with five points and fill in each points of the star with fact that could be used by another person to introduce his or her to the group. (Give some suggestions to the group: "You might indicate things you love, a hobby you have, a personal goal, places you have lived, and soon.")
2. After five minutes have people choose partners and exchange information on their stars. After three minutes, instruct them to change partners and do the same again. After three more minutes, instruct them to change partners and do the same again.

3. Ask each person to introduce his or her last partner by giving that person' name and three fact about him/her from three different points on that person's star. (Allow one minute per introduction.)

8:45 Departmental direction and goals

Timeline exercise and discussion

10:00 Break

10:15 Introduction to Team Building Session and to "Roles"

X Goals
X Agenda
X Norms

1. Explain the difference between position and role: A position is the actual job one hold as defined by its relationship to others employees and to the system as a whole (generally a hierarchical relationship); a role includes those activities and behaviors that one is expected to demonstrate while holding this position.

2. Write the words "role confusion" on a flip chart and ask, " What can happen if an individual is not clear about his or her role? List the responses. Ask, "What can happen if team members are not clear about one another's roles?" List the responses.

3. Mention tht the goal of this session is to determine the role parameters within which each person operates. The purpose of this process is to minimize any misunderstandings within the team. This activity is meant to provide the team with a nonthreatening setting in which to examine mutual expectations, demands, and responsibilities.

11:00 Individual exercise: Role Clarification

Mention that the first step in this process will be to discuss each person's individual role. Hand out the Role Clarification sheet and ask each person to take a few minutes to complete the individual exercise.

11:20 Small-group role discussions and feedback (in mixed subteams)

Divide the group into the three subgroups so that each includes members from each of the three departmental subteams. Using the Role Discussion Exercise sheet as a guideline, each subgroup should discuss its members' roles, one by one. Allow seven to ten minutes person. Encourage the person whose role is being discussed to listen actively, ask questions if necessary, and take notes. The goal is to solicit feedback on the way others see the role, not to alter or defend the role.

12:00 Lunch

12:45 Subteams meet to:

1. Bring the small groups back together into one group. Ask how the role discussions went.

2. Mention that the next assignment will be done in departmental subteams. Instruct subteams to discuss each person's role briefly (as presented in the previous exercise) and then to work together to list the major responsibilities of the subteam.

3. Show a sample matrix chart and instruct each subteam to create its own matrix chart in the fashion shown. Ask them to fill in the responsibility portion of the chart. Remind them that they will have to use two pieces of flip-chart paper to make the complete matrix.

1:30 Everyone mills around room to:

Bring people back into one group and instruct everyone to mill around the room and read other subteams' charts. Instruct everyone to remain silent during this exercise. Ask people to write comments on the blank flip chart beside the other subteam's matrix chart (not their own). The comments may include positive feedback, suggestions, or questions (if something is no understood). Hand out medium-sized ;marking pens for this activity.

1:45 Subteams reconvene, read comments, and revise lists

Have subteams reconvene, read the comments made by other subteam members, and revise their matrix charts, if desired.

2:15 Break

2:30 Subteams report to large group

1. Bring the large group back together and have each subteam report on any changes they made to the charts as a result of people's written comments.

2. Ask people to comment on what they have learned or discovered about the work they have done so far.

2:45 Complete Responsibility Matrix

1. Bring the group together. Explain that the last step in a responsibility matrix is to indicate the following for each responsibility:

   Who has primary responsibility;
   Who has secondary responsibility;
   Who needs to be informed; and
   Who must approve decisions.

2. Taking one subteam's chart at a time, as a group, look at each major responsibility and determine those individuals who:

   θ Have primary responsibility
   ° Have secondary responsibility
   □ Need to be informed
   □ Must approve decision

Use symbols, as shown above, to indicate the level of responsibility.

3. After about fifteen or twenty minutes, switch to another subteam's list and do the same. Switch to another subteam after fifteen or twenty minutes again. If there is not time to complete the entire matrix, suggest that the team finish it as an action item at an upcoming meeting.

4:15 Wrap-up discussion

1. Highlight and summarize insight.
2. Determine action items to be attended to. Record and post.
3. Do a round-robin feedback; ask each person to:
   X Name one thing valuable about the session;
   X Name one thing he or she wishes had been done/happened.
4. Lead the "Positive Messages" exercise (optional).

Distribute a piece of paper to each group member. Ask each person to write a positive message about he group and the experience of working with the other group members. Collect the papers and shuffle them. Redistribute them. Ask each participant to read aloud the paper he or she has received.

5. Thank people for their hard work and compliment them on their progress.

5:00 Adjourn.

LEADERS NOTES

Things to do after the meeting: (includes promises made to the participants during the session, filing of design notes, forwarding of feedback to the group.)

1.
2.
3.
4.