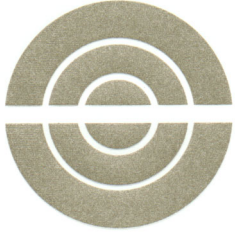


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# HANDY HINTS FOR RUNNING MEETINGS

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Group Action Methods for Team Meetings

## Preparing for Meetings

### **FACT: Managers spend more than one-third of their time in meetings!**

This startling fact makes it imperative for all companies to have consistent methods for conducting team meetings. When implemented correctly, the model described in this booklet can cut meeting time in half and more than double a group's productivity. This model was carefully developed over time and is a proven starting point for effectively involving team members running meetings effectively.

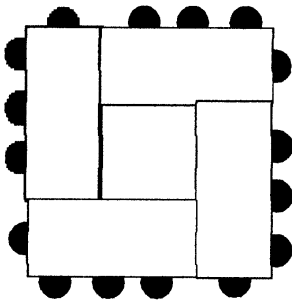
During our experience in refining the most effective meeting management methods, we found **planning the agenda** was the most critical element. Here's a quick overview of crucial ingredients for a successful meeting:

1. Room Setup	Choose the seating arrangement that best matches the purpose of your meeting.
2. Meeting Logistics	Give due consideration to items such as room scheduling, refreshments, and AV equipment.
3. Agenda Format	Provide an agenda with a clear list of topics in advance of the meeting.
4. Member Roles	Assign key roles including meeting coordinator, recorder, time keeper, and participants.
5. Conducting the Meeting	Develop a consistent method of conducting meetings that allows for collecting agenda items, productive decision making, and self-critique so the group improves its meeting effectiveness over time.
6. Debrief	At the end of the meeting, the convener leads a brief discussion of the group's interaction and effectiveness as a way to provide continuous self-renewal.

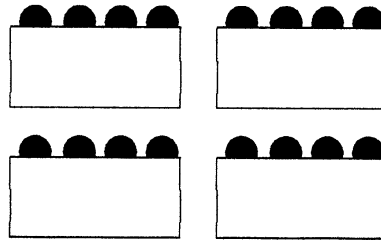
# I. Room Setup

Each of the room arrangements shown below has its pros and cons, and should be carefully considered in light of the meeting purpose. The **horseshoe** is one of the most common and effective layouts. To encourage give-and-take discussion, choose the **hollow square** which calls for a closed rectangular seating, usually around tables. For the most intimate seating, get rid of all tables and seat participants in a closed circle.

With a **conference** or "classroom" style (all facing ahead), there is an obvious tendency for the person at the head of the "class" to talk. This may be an extremely functional way to seat a group but does not always encourage the most discussion.



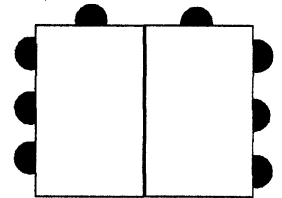
Hollow Square



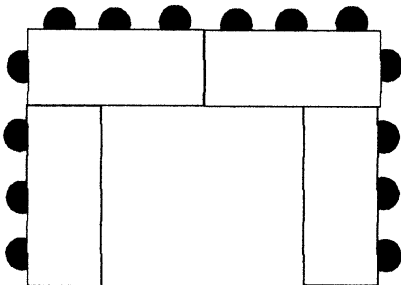
Podium



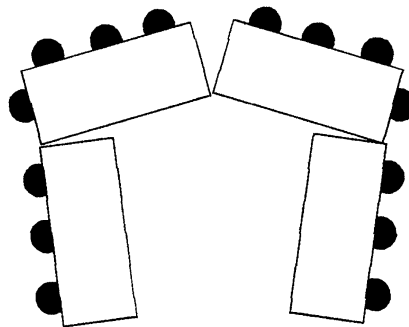
Conference



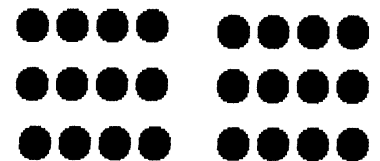
Board



Open "U"



Horseshoe



Podium



Classroom

## **2. Meeting Logistics**

This important part of meetings is often ignored. Logistics include scheduling the meeting room, ordering refreshments, monitoring room temperature, requesting needed AV equipment, providing notepads and pencils, and choosing seating arrangements. When scheduling a meeting, the preferred time is morning or more toward the end of the day; rarely after lunch.

### **Meeting Length**

The average business meeting should not exceed 90 minutes, and may be extended only by agreement of the group. Set a goal of 60 minutes which is ideal.

### **Refreshments**

If the meeting will run all day, have refreshments available throughout to ensure best productivity (coffee and rolls in the morning, soda and cookies in the afternoon or a veggie tray).

### **Room Temperature**

Recommended temperature is between 68 to 70 degrees.

### **AV Equipment**

Audio-Visual equipment checklist should include:

- Overhead transparency projector
- LED, computer generated projector
- TV, VCR
- Microphone, sound system
- Flip chart with pads
- Tape recorder
- Screen for projection
- Felt tip markers
- Roll of masking tape
- Blank (clear plastic) overhead transparencies
- Table tents/name tags
- Pens, pencils, scissors, highlighters

### 3. Agenda Format

Getting topics on the agenda can be done immediately at the outset of each meeting, at the end of each meeting (plan the next agenda), or any time between meetings. Ways to get topics onto the meeting agenda are:

**Design a form titled "Items for Agenda."** This is one way to encourage members, staff, ad hoc or ongoing committees to submit agenda items. The form encourages the respondent to identify if the topic is purely informative, or if it might be considered for discussion or action.

**Identify a central person** (perhaps a secretary or convener) to receive proposed agenda items, or have people e-mail their items to an appointed person.

**Post a sheet of paper or easel pad** on a bulletin board or in a well-traveled spot and invite people to write their agenda topics on the form.

People are 80% more effective if they know the agenda ahead of time!

These are but a few ideas. Your own unique situation will dictate the best approach for you.

The agenda format on Page 9 of this booklet is a proven process for outlining agenda topics. It is designed to encourage planning by all group members prior to the meeting.

### Agenda Categories

All agendas must include: Priority – Person – Time as well as Information – Discussion – Action.

#### Priority

The sequence of topics.

#### Person

Who sponsors the item and will take over the topic at their appointed time.

#### Time

How long the sponsor wants or has been assigned to present their topic/discussion.

**Topics**

Each topic must be assigned information/discussion/action as a way to represent how the group is to handle that topic.

**Information**

Topics that need to be announced verbally (face-to-face).

**Discussion**

Topics not ready for action, but in need of brainstorming and group reactions. This item may be one that requires an individual's decision, but group input is desired as part of the decision making process.

**Action**

A topic requiring the group's support and expertise before a decision can be made. If you want a decision on this item, you are required to provide a hard copy to all participants. (Many groups "Discuss" at one meeting and then move the item to the next meeting for "Action.")

Agenda topics are usually prioritized ahead of time and numbered in order. At the beginning of each meeting, item priority may be confirmed by having the convener propose the agenda sequence to the group for any necessary changes.

## 4. Member Roles

The "**convener**," after adding additional items proposing the priority of time and order of discussion (which item is first, second, and so on), ensures there is an adequate method for recording the minutes or meeting notes (appoint a "**recorder**"). Once this has happened, the meeting process starts. If you are to use a flip chart, the convener appoints the "**scribe**" who will stand or sit next to the flip chart and publicly record pertinent information. Reviewing the purpose of the meeting and the quick resetting of the agenda signifies the meeting start up. The "**timekeeper**" makes sure the meeting starts and ends on time and that each item on the agenda receives the designated amount of time.

## 5. Conducting the Meeting

People should know what will be on the agenda and their level of involvement in the topics prior to the meeting.

The official group leader (committee head, team leader, manager, supervisor, etc.) ensures there is a clear process for setting the agenda. Most often, the formal leader of the group will sort topics, selecting for the agenda those subjects that impact a majority of the participants. If a topic is proposed that can be handled in a one-to-one meeting, the team leader encourages this step prior to placing it on the group's agenda.

Initially, the convener welcomes everyone to the meetings, states the purpose of the meeting, and then reviews the list of agenda items. The convener of the meeting posts the agenda for the group on flip chart, transparency, or on written paper.

Typically, the designated team leader will complete and distribute the agenda using a format similar to the one titled "Meeting Agenda" in this booklet to all members in advance.

Some groups have ongoing, objective measures of group or department performance that are both "hard" (economic, sales, volume indicators) and "soft" (morale, customer reaction data, etc.). This information is best dealt with as a standing agenda topic.

The convener states the next topic, what the sponsor wants to do with the topic (information/discussion/action), the amount of time requested, and turns the item over to the individual "sponsor" who will present/lead the item.

The convener provides transition from one subject to the next by summarizing what was discussed, making sure it was properly documented, what action was assigned (if any), and moves the group onto the next agenda item by saying, for instance, "Our next topic is 10 minutes, an information item sponsored by Fred."

At the end of the designated time, the convener must either gain closure (who will do what by when) or get agreement to extend the item for a specific time period ("Let's give this five more minutes.").

At the end of each item, the convener, in a sentence or two, summarizes, ensures adequate recording, and moves on to the next topic.

Have the convener facilitate any kind of question and answer interactive. This is their job to handle the meeting. In some cases, though, the presenter may handle the questions directly if they are the expert. Again, do what works best for you.

- **Survey:** Any one can call for a survey of opinions, each person speaks, uninterrupted. Caller of survey summaries.
- **Talk-Over:** When there is an interruption.
- **"Plop!":** When an idea is ignored.
- **Parking Lot:** The meeting after the meeting.
- **Side-Bar:** Two or more people talk to one another during the meeting.
- **Spin-Out:** Go off on a tangent, or the group wanders off onto another topic.



## 6. Debriefing the Meeting

Many groups informally debrief by lingering for a few minutes to unwind and share reactions. At the end of the formal meeting, you can “debrief” by asking for each participant to state their reactions to the way the meeting was conducted. Encourage a one-sentence critique that is done without discussion. This step helps the convener to improve and also encourages the whole group to take responsibility for the process.

Be sure to give a sense of closure by highlighting the key decisions, thanking presenters, listing the next meeting agenda, announcing the time and place of the next meeting, and/or debriefing the meeting as described below.

Pluses and wishes: What went well?  
How could we improve?

What unique quality did we display  
at our meeting today?

What did you learn about us today?

Pick one word to describe today's meeting.

## Management Presentation

After the group has completed its work, they are responsible for communicating the results. Contact your management team and invite them to attend a presentation at your next regular meeting. The purpose is to inform managers, involve affected interests, broadcast success, and inspire others.

Plan your agenda carefully. For example, to discuss the results of a business process improvement, you might include the following:

- Analysis of original work flow
- Decisions about what to improve
- How improvements were tracked
- Summary of the new process

Management Team

Meeting Agenda

Debra

Convener/Facilitator

Date: April 27  
 Place: Executive Conf. Room  
 Time: 10:30 a.m.

Greg

Recorder/Scribe

Participants: *Jan, Sue, Bill, Alan*

Priority	Person	Time	Topic	Info.	Discuss	Action
			Standing Agenda - Sales numbers - Volume indicators			
2	Bill	10	Marketing Report - new opportunities on horizon	X	X	
1	Sue	5	Guests/Visitors to Company - purpose of visit - who will tour them	X		
3	Jan	20	Purchase of New System - software is debugged - product is now useable - do we want it?	X	X	X
			Next Meeting Agenda			
	Jan		Report from the site visit to: - vendors of the proposed system - users of the proposed system			
Who		Will Do What			By When	
Jan		Conduct site visit			May 15	
Alan		Purchase software			May 19	

Meeting Agenda

Convener/Facilitator

Date: \_\_\_\_\_  
 Place: \_\_\_\_\_  
 Time: \_\_\_\_\_

Recorder/Scribe

Participants:

Priority	Person	Time	Topic	Info.	Discuss	Action
			Next Meeting Agenda			
Who		Will Do What			By When	



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