

Planning and Running a Successful Meeting June 2015

A well-run meeting leads to positive results and increased productivity. It allows people to build on each other's ideas and expands the creativity of the group. Meetings that are poorly planned or aren't run efficiently waste the time of participants and your organization. They also leave employees feeling frustrated and overloaded. In this article, you'll find information on making the best use of meetings whether you're meeting with people face-to-face, on the phone, or online.

1. When is meeting necessary?

Before calling a meeting, ask yourself if one is really necessary.

Given the high cost of people's time, meetings are an expensive choice for getting things done. Maybe you could accomplish your goal with a phone call, a memo, or an e-mail instead.

For example, if you are simply distributing information and you don't need participants' feedback, a memo might be sufficient.

If you only hold meetings that are necessary, you'll build a reputation as a person who doesn't waste others' time in meetings.

2. A meeting might be necessary to:

- share information as a group
- problem solve as a group
- brainstorm
- plan and set goals
- allow people to voice concerns and know that they have been heard
- move a project forward or jump-start a process that has gotten bogged down
- generate enthusiasm, perhaps for a project that doesn't have complete buy-in
- involve more people when broader acceptance (consensus) and input are needed
- find out how changes under consideration will affect different parts of the organization and modify plans accordingly
- build working relationships and strengthen group ties
- take collective responsibility for a course of action
- celebrate successes in your company or department

3. Plan ahead and prepare

If you decide to call a meeting, plan ahead so that you don't waste your time or anyone else's. Attendees will notice if you aren't prepared.

- **Be clear about why you are meeting.** Write down the purpose and objectives of the meeting. You should be able to do this in a sentence or two.
- **Decide who needs to be at the meeting.** Invite only those people whose presence or input is necessary. You may be able to limit the size of the meeting by using additional methods to share information. For example, if appropriate, instruct people at the meeting to pass information along to their staff or co-workers.
- **Decide how much time you need for the meeting.** In some organizations, people automatically schedule an hour, when a half-hour would do; discussion then expands to fill the allotted time. Try reducing the length of the meeting and keeping it focused and productive. It's OK to end a meeting before the allotted time if you've accomplished your goals. Participants will appreciate having the extra time.
- **Give people as much advance notice as possible.** Send out an announcement of the meeting by e-mail. In addition to stating the purpose of the meeting, include the date, time, location, and call-in number if appropriate.
- **Prepare an agenda.** An agenda can help you have a successful meeting. Prepare an agenda that clearly outlines: - the date of the meeting and the hours the meeting will run - the location of the meeting, and any call-in or log-in information for conference calls, videoconferences, and online meetings - a brief summary stating the purpose of the meeting - topics to be discussed - the time allotted for each agenda item, if appropriate
- **Choose a convenient time.** Schedule meetings in core hours. Try to avoid meeting very early or very late in the day. Be aware of time zone differences for conference calls or videoconferences.
- **Distribute the agenda and any meeting handouts ahead of time so people can prepare.** Send the agenda out at least two days in advance of the meeting. This way, the agenda also serves as a reminder for the meeting.
- **Be familiar with the visual aids and special tools you will be using at the meeting.** Be sure the tools you need are available in your meeting place, including video, Live Meeting, white boards and markers, PowerPoint, etc. Make sure that you know how to use all equipment in advance.
- **Send everyone a reminder a few days before the meeting.** This isn't necessary if you've sent out an agenda and reminder together.

4. Running a meeting

- **Welcome people** and have them introduce themselves **if** there are newcomers or if people don't know each other. Remember to do this for teleconferences as well.
- **Restate the purpose** of the meeting. "We're here today to. . . ." At the beginning of the meeting, briefly review the agenda.
- **Ask a participant to take notes.** The leader should not be the note-taker.
- **Keep the meeting focused and on task.** If you are chairing the meeting, help people stick to the agenda. When people wander off topic, steer them back. You might say, "Let's stay on track. That's a good topic for another meeting."
- In a decision-making or participatory meeting, **encourage everyone to contribute.** Try to **ask for opinions from participants who haven't spoken.** Everyone will be grateful, and the meeting will be more productive if you prevent one or two people from monopolizing conversations.
- **Manage interpersonal conflicts** that may arise. **Make sure that no one is allowed to criticize anyone else** and that everyone's viewpoint is respected and heard.
- **If interest appears to be lagging, change the format.** You might ask a question, such as, "What do we want to accomplish today?" Or ask specific people for comments. Or switch to another item on the agenda. You could also decide to end the meeting early and pursue your objectives another way.
- **Schedule breaks during long meetings.** Experts suggest that meetings should never run for more than 90 minutes without a break. Give people time to stretch and leave the room for a 5- to 15-minute break if necessary. Let attendees know how long the break will last, and resume the meeting as planned.
- Keep your **eye on the time.**
- **At the end of the meeting, summarize key points and what steps need to be taken next.** Assign action items, tasks, and steps for follow-up. Send minutes or follow-up notes from the meeting, if appropriate.
- **End on time and on a positive note.** For example, "This is a great first step. We've accomplished a lot today." Don't forget to thank everyone for coming.
- **Follow up on action items, assignments, and deadlines from the meeting.** **Send a quick e-mail** to participants and other key stakeholders within a day or two summarizing the progress made, action items, and assignments. **Coordinate with the note-taker** and include, as an attachment, his or her detailed account of the meeting for record-keeping purposes.

5. Keeping regular staff meetings productive

- **Make sure team meetings aren't boss-centric.** In other words, a dominating manager or supervisor can limit "idea sharing." Do team members mainly address their questions and comments to you, or do they interact directly with each other at meetings? **Encourage members to ask each other for help**, and to offer it, without channeling it all through you. Allow one idea to build on the creativity of others. Once again, dominance of a group by a manager or supervisor can limit idea sharing.
- **Ask members of your team to take turns leading regular staff meetings**, if appropriate in your work culture. Depending on the circumstances, the roles of note-taker and timekeeper can also be rotated.
- **Consider having frequent, short meetings if appropriate.** Focus on one or two key issues, stay on track, and don't keep people for more than 30 minutes. Quick meetings are a good way to solve simple problems, touch base, and keep people informed.
- **For regular meetings with the same group, change your meeting site from time to time if possible.** Can you rotate offices? Meet outdoors? Meet in the lunch area or over coffee? Even varying the conference room can help avoid staleness. Consider having refreshments occasionally or varying your tools -- one week a flipchart, one week PowerPoint, and so on.
- Talk with your manager about instituting a **meeting-free day of the week or month** or even certain hours of the day, if possible.
- **Make meetings worthwhile for everyone.** Find ways for everyone in the group to contribute and participate. Ask for input. Follow up on comments with positive remarks like, "That's a good question" or "That's a good idea."
- **Ask people** in your group **for feedback.**

For example, ...How do people feel about regular staff meetings? What can you do to improve your group meetings? How frequently do people find your staff meetings necessary and when are they most helpful?

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