A Brief Guide to Meetings

Be Aware of the Basics of Holding Good Meetings

Meetings are often the bane of any project's existence. They can make or break your project—and it's important to understand some of the basics of planning appropriate meetings and how to keep them on track.

You hardly need to be an expert at Robert's Rules of Order in order to hold an effective meeting—and those rules are rarely—if ever—used in today's project world. While you can learn many of the basics of conducting project-based meetings by observing, you can also pick up a lot of bad habits and poorly implemented shortcuts that way.

This brief chapter will provide you with a clear approach to effectively holding meetings.

Russ Unger

When to Hold Meetings

It's always important to consider whether the cost of a meeting is justifiable before you even consider scheduling one. Every one-hour meeting you schedule doesn't simply cost *you* one hour of time, it also costs you one hour *per each employee* in the room.

That means that if you have eight people in a meeting for one hour, and each person has a business cost of $100 per hour, you've just spent $800 on a meeting—the equivalent of a single workday. Keep in mind that this does not account for travel time or loss of other work that could be accomplished, so the $800 is definitely a low estimate.

That's a lot of time and money for a simple 1-hour meeting. It's even more expensive when you factor in any tardiness, lack of focus, wrong people in the meeting, or other distractions.

To plan for meeting success, you have to determine that having a meeting is the right thing to do in the first place. Diane Brewster-Norman, one of the creators of the Franklin-Covey Meeting Advantage workshops (www.franklincovey.com/tc/publicworkshops/communication/meeting) has identified five key questions to ask before calling a meeting:

- Does the total cost of the meeting justify the advantages of holding it?
- Are the people who can make decisions available to attend? (Is the timing right?)
- Is the purpose of the meeting clear?
- Is the necessary information available?
- Have alternatives to holding a meeting been considered?

If you answer yes to these, you have the need for a meeting. If you have determined that you cannot otherwise get the information or the approvals you need to continue making progress on your project, then by all means, schedule a meeting!

But first, make sure that you can't get the same results by picking up the phone, sending e-mails or instant messages, or trying other avenues. Use the approach that's the most efficient and effective way to get the results or information you need. For that matter, you should do your best to avoid using e-mail as a crutch to avoid face-to-face or asynchronous one-to-one meetings.

Last but not least, when scheduling your meetings, always try to get the early time slots when you know people are in the office. While it is slightly unrealistic to think that all your key players will be in the office at 8 a.m., you should have a general sense for when people arrive and are ready to start their workday. Do your best to book the earliest time that everyone you require is available. If that time slot is unavailable, the middle of the morning and the middle of the afternoon are generally good options to try. Note that these options are generally in the "middle"—try to avoid holding your meetings at a time that would disrupt people's usual start-of-the-workday and right after-lunch habits. Those are the times that people may have the most difficulty committing to.

No matter what you do, make sure that you take every step necessary to avoid being the person who schedules a meeting for the first thing in the morning on a Monday or the end of the day on Friday (or any workday, if possible). No one really likes that person.

The Agenda

Just as every project should have a good supporting project plan, a good meeting should have an agenda prepared beforehand. The agenda keeps your meeting on track; it provides attendees with the purpose of the meeting and an outline of the topics for discussion.

An agenda also forces the meeting organizer—you—to spend some quality time thinking through the goals and objectives of the meeting, as well as who should be in attendance. A little planning goes a long way toward the success of your meeting, sets the expectations and responsibilities of the attendees, helps you obtain your goals for your meeting, and gives you one last chance to consider alternative approaches to accomplish the agenda.

Like the sample in Figure 1, an agenda should always have the following information:

- Meeting title or type
- Meeting date, time, and duration
- Physical location
- Dial-in information (if required)

- Online conference information (if required)
- Attendees list
- Meeting purpose
- Who is responsible for what and how long they have to accomplish it

At the very least, your agenda should provide enough information so that all attendees have a clear understanding of what the purpose of the meeting is and what is expected from them. Keep your purpose direct and to the point, and always try to use actionable words that clearly describe what the expectations are.

Meeting Agenda

PROJECT STATUS	MEETING LOCATION
November 12, 2008 10:00 – 11:00 A.M.	The Bean Conference Room Dial-in Information: 800-123-4567 Attendee Code: 1234567# Online Conference Location: http://meeting.yourcompany.com/

Attendees:

Russ Unger, Carolyn Chandler, Brad Simpson, Christine Mortensen, Jonathan Ashton, Chris Miller

Meeting Purpose:

- Review the current status on Research, Graphic Design and SEO
- Discuss outstanding issues
- Prioritize and plan next steps

PRESENTER	TOPIC	TIME
Russ	Welcome	5 minutes
Carolyn	Research Update	10 minutes
Brad & Christine	Graphic Design Update	15 minutes
Jonathan	SEO Update	15 minutes
Chris	Parking Lot	10 minutes
Russ	Next Steps	5 minutes

Figure 1 *Basic meeting agenda example*

Meeting Rules

Even after you have meticulously ensured that it is appropriate to hold a meeting and have created a stunning agenda, all it takes are a couple of slight missteps to make the entire session unproductive. Despite your best efforts, meetings can pretty easily jump off the rails and take on a life of their own.

To alleviate some of the stresses that go along with being the person in charge of the meeting, establish some ground rules for the attendees that set expectations early on.

Basic Meeting Rules

The following ground rules for your meetings will provide clear direction to attendees and help support you as you strive to keep the meeting on track:

- Send any required reading materials with sufficient advance notice. Send a reminder of the obligation within 24 hours of the meeting. If you are able to do so, deliver a hard copy of materials to attendees as far in advance of the meeting as possible. This may seem silly, but it will help attendees to show up prepared.
- Always start and end your meetings on time. Better yet, try to end 60-minute meetings between 5 and 10 minutes early and 30-minute meetings about 5 minutes early to allow your attendees time to pack up their belongings and have time to travel to what is most likely their next meeting.
- Keep your meetings as short as possible. Ideal meetings are 30 minutes, and maximum meeting times should be no more than 2 hours. Anything longer is most likely trying to cover too many topics, and 2 hours is well beyond anyone's attention span anyway.
- If your meeting requires a majority decision, invite an odd number of people. If your meeting requires consensus, invite an even number of people.
- Keep discussions focused on the agenda items.
- Be a good listener. Do not interrupt when others are talking, and do not assume that you know what they are going to say.

- Go “topless.” Unless they are required for the meeting, leave all laptops, phones, and other distracting devices out of the meeting space. At the very least, make sure all such devices are turned off or muted.
- Show up for the meeting prepared. As the person who sets up the meeting, make sure you supply printed copies of any necessary materials and/or instruct attendees to bring their own.

Note *People often skim through or overlook meeting notice details, so be prepared by either sending out a reminder or supplying required materials.*

- Document *every* meeting and assign a note taker for your meetings. If no note taker is assigned, surprise, you’re it!
- Make the meeting rules available to everyone for the first meeting. Depending upon the group of people, it may be helpful to append these rules to your agenda template (see Figure 2).
- Close your meetings by identifying the next steps and assigning responsibilities and deadlines for tasks.
- Distribute your meeting notes no more than 24 hours after the meeting.

Although these ground rules can be helpful, they are only useful as long as the attendees are willing to support them—and you. In a perfect world, the meeting rules would simply be followed and all of your meetings would be successful. The real world isn’t perfect: People always have different agendas, other obligations, and sometimes they rely on technology or other people to keep them up to date with their calendars.

As long as you do everything you can to try to keep the meeting you’ve scheduled on track, your attendees will eventually follow your lead and help you have successful meetings. But be forewarned: The path to hell is paved with good intentions. If you should become the person who deviates from the agenda and guidelines that *you* set, your respect could go flying out the window.

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Russ	Next Steps	5 minutes

In order to keep the meeting on-track and as effective as possible, please do your part by observing the following meeting rules:

- Arrive on time (or send a proxy who can make decisions in your absence)
- Stay on topic; reserve side conversations for after this meeting
- Allow the person with the floor to finish speaking before responding
- Leave laptops and other devices behind or shut them off
- Bring all required materials to the meeting
- Carolyn will be the note taker—please turn in your notes to her if necessary
- Meeting notes will be sent to attendees within 24 hours

Figure 2 *Basic meeting agenda with meeting rules*

After the Meeting

Once your meeting is over, it's time to get back to work!

Almost.

Actually, it's time for you to sit down and put all your notes together to send back to the meeting attendees—assuming, of course, that you are the note taker. Regardless, the responsibility is on you to ensure that everyone has an opportunity to review the notes and provide additional input or feedback. This allows everyone to continue making progress in a unified fashion, based on the outcome of the meeting.

Good meeting notes will provide everyone with a clear accounting of what occurred in the meeting and what their objectives and responsibilities are moving forward (Figure 3). Your meeting notes should clearly indicate action items and who is responsible for completing those tasks, as well as any decision points that needed to be resolved. Treat your meeting notes as a paper trail, and file them away with your other project documentation, along with any modifications or conversations about those notes.

Last but not least, do not put off sending out your meeting notes any more than 24 hours. If too much time passes, it's not nearly as easy to decipher your own notes, and people's recollections can fade. A delay can open the door to varying opinions and potentially create additional work by triggering more discussions of topics covered in the meeting.

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TOPIC	NOTES
Welcome	Review current status from disciplines Discuss outstanding issues Prioritize and plan next steps
Research Update	Research in progress, 50% complete In-person research underway Scheduling facilities in the Midwest for next week
Graphic Design Update	Defined color scheme Iconography created and ready for review
SEO Update	Keyword study complete Content analysis 25% complete
Parking Lot	Chapter outline complete & sent to publisher Assigned chapter due dates Implementing publisher templates for chapters
Next Steps	**Russ:** Next status meeting scheduled for November 19 at 10 A.M. **Carolyn:** Complete next 25% of research in Midwest **Brad & Christine:** Graphic Design to comp book covers **Jonathan:** Complete next 25% of content analysis **Russ & Carolyn:** Keep writing—faster! Chapters due 11½ **Chris:** Chapters reviewed within 24 hours of receipt

Figure 3 *Basic meeting notes example*

Dealing with Nonconformers

Although you will invariably do your best to be a great meeting planner, agenda creator, and note-taker and -sender, some people will simply fail to comply with your requests to follow the meeting rules that you establish. Unfortunately, some of them will be your coworkers and friends; others will undoubtedly be even worse offenders: your clients.

It seems pointless to write a chapter on dealing with meetings without mentioning how to deal with the people who don't conform to the meeting rules. How do you prevent someone from breaking the rules you put into place? How do you politely suggest that someone put away their mobile device and stop sending instant messages or e-mails while you are trying to hold an effective meeting?

An unscientific poll of Twitter users uncovered a variety of approaches. Hopefully, some of these will help you identify a solution for dealing your nonconformers.

> "Have a respectful, frank, professional conversation with the client that if they accept a meeting, that the clock starts when the meeting starts."

> "The last coworker to the meeting has to be the note taker."

> "Inform coworkers not to waste anyone's time by being tardy."

> "One company used to make the late people wear a VIP button that had lots of ribbons. That conveyed to people that you must be a VIP to make all of these other people wait on you."

> "Start the meeting on time. If people are late tell them they can read the notes that will be sent around after the meeting."

> "Bring coffee, tea, donuts, cookies, etc. to your meetings and people will begin to show up early or on time. They'll also be a bit more attentive and helpful."

> "As the meeting organizer, make sure that you are not only on time, but a little early to every meeting. People will know you by that behavior and begin to follow suit."

While some of those are humorous, dealing with people who do not or will not take your meetings seriously is a sensitive issue. A respectful approach to meetings generally starts from the top down within an organization. If you are having a difficult time getting attendees to observe the meeting rules, start by having a discussion with your immediate superior to ask for support. (If your immediate supervisor is part of the problem, you may need a different book for support!)

In all seriousness, start with respectful, open lines of communication and ask for support. If you still run into problems, assess the company culture you're dealing with and determine whether this is a problem that you simply have to live with or if you can go up the chain of command to ask for support. These situations are sensitive to deal with—be sure to proceed with caution, courtesy, and respect.

A Final Note on Meetings

This chapter has provided a brief introduction to planning and holding effective meetings as well as proper meeting follow-up. Meetings are necessary to keep a project moving. Part of your task will be to find the most effective way to run them with your team.

Countless approaches to meetings exist; this chapter presented only a sampling. Some companies hold meetings standing up to help move them along quickly and keep attendees alert and undistracted by technology. Some groups attempt to schedule all their meetings on a single day to attempt to increase productivity. Some create nifty catch phrases, such as "topless meetings," to gain attention for their meeting philosophies. Some hold "minimeetings," in which only a couple of people discuss a limited number of issues, to minimize the signal-to-noise ratio.

Whatever the approach, there is no denying that meetings simply do have to happen. Regardless of whether you bring distant teams together via technology or sit down in a coffee shop with a peer, once you start discussing a project, you are having a meeting—even if it's unscheduled.

You might as well spend a little effort and show up prepared, even if it's just with a punch list of questions you need to get answered. You could even call that list an agenda, if you were so inclined.

Over time, you will evolve your style and approach, and determine the method that works for you. Whether or not you call it a *meeting* is your choice.