

EFFECTIVE MEETINGS

PLANNING & CHAIRING

ML Taylor
August 2011

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Why Have a Meeting?

- Information
 - people will learn X*
- Planning & Sharing
 - We will create a Y plan*
 - We will discuss and decide*
- Accomplish
 - We will create*
 - We will resolve*

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Why Not to Have a Meeting

- No identifiable purpose
- No time to plan it or prepare
- The right people can not attend
- No commitment to control it
- No intent to document actions & decisions

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Logistics...you gotta know

- Who plans to attend?
- Is there equipment and does it work?
- Do we have handouts & references?
- Do we still need to meet?
- Are we ready?

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Meeting R.O.I.

How much does it cost to have people there?

What is the impact of a non-productive meeting



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Planning a Meeting

- Invite the right people
- Prepare a complete agenda
- Ensure everyone understands the purpose of the meeting
- Help people come prepared
- Ensure everyone is working from the same documentation,
- Allow enough time

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Planning for a Meeting



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Who should attend?

- You need to hear and understand
- You have the needed information/expertise
- You can be part of the solution
- You need to make the decision
- You need to hear the discussion or outcome
- You are part of the implementation team

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Agenda

- Identifies the date, time, purpose, people, topics, reference documents, expected outcomes and allocated discussion time
- Provides space for notes
- Records key decisions & facts
- Does not regurgitate the discussion

Tip: use an agenda template that includes typical attendees, and check boxes for typical actions – then just check the boxes to record notes

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Plan for Success

- **Agenda**
 - Write the agenda so it can be used as the meeting notice and as a template for the meeting notes
- **Give people time to prepare**
 - Suggest relevant information and reading
- **Allow time to hear from everyone**
 - Take individuals offline or defer topics if there is not enough time
- **Record decisions** and key points ASAP!
 - “we decided...” “we agreed...” “we voted...”

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“The meeting's at 10. I'll send you a copy of the agenda, the hidden agenda and your personal agenda.”

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We Met, We discussed, We Decided

Elaborate meeting minutes in the form of a 10-page dissertation distributed 30 days after the meeting is not as effective as an edited copy of the agenda with a record of the decision 1 day after the meeting

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Meeting Minutes

- Attributes: concise, decisive, facts
- Final Chance to succeed
- Confirms decisions
- Identifies Actions
- Publicity tool for members
- Invites feedback & future participation
- Sets the stage for future meetings
- Provides a record

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Facilitated Meeting

- Use an independent facilitator when....
- You want to have free exchange of ideas
 - Idea Harvesting (a.k.a. brainstorming)
- You want someone who can keep the meeting on track objectively
- You want a more formal outcome
- Facilitator tasks to include organizing, leading and recording the discussion

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Now.....The Bad News

In order to have an effective meeting, you have to control the participants

DOCTOR FUN | Oct 2002

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The daydreams of cat herders

Words of Wisdom

- Guide the discussion
 - Thanks for that information, lets' move on so we can hear from other people
 - Now let's hear from someone who has a contrary opinion
 - Call on people who are too shy to talk
 - Use pointed questions to shortstop rambling
- Keep it real
 - Challenge participants to separate facts from opinion
 - Ask people to express their own opinions not speculate about other's opinions
 - Ask people to keep comments positive/productive

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More Words of Wisdom

- Keep it productive
 - We will table this topic until everyone is ready to discuss it
 - Can we make a decision with the facts presented?
 - What else do you need to know in order to make a decision?
- Reinforce contributions and efforts

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RulesOnline.com

Welcome to Robert's Rules of Order Online!

According to Robert's Rules of Order, parliamentary procedure is based on the consideration of the rights of the majority, of the minority (especially a large minority greater than one-third), of individual members, of absentees, members of all of these groups taken together.

"The application of parliamentary law is the best method yet devised to enable assemblies of any size, with due regard for every member's opinion, to arrive at the general will on the maximum number of questions of having consensus in a minimum amount of time and under all kinds of external climate ranging from total harmony to hardened or impassioned division of opinion."
Robert's Rules of Order Newly Revised (RONR) (11th ed.), Introduction, p. 18

Although the copyright on the original Fourth Edition of **Robert's Rules of Order Revised** has expired, it remains an important work. **RulesOnline.com** contains the full text of this book, including lesson outlines and Plan for Study of Parliamentary Law, along with the added convenience and functionality of index and keyword search. This handy online reference tool is useful to students of parliamentary procedure and parliamentarians alike.

RulesOnline.com was recently featured on **SoundBites Radio**, a national radio show distributed to the over 500 stations on the CBS News network. The show, hosted by Jan Zitt, is in its thirteenth year of continuous broadcast.

Learn more about Robert's Rules of Order, Parliamentary Procedure, Bylaws, Conducting Meetings, and Taking Minutes with RulesOnline.com.
[Take our quick 10-question parliamentary quiz - Test your knowledge!](#)

Going to a meeting but not sure what to do or say? Unprepared, but want to know how to take part? Learn quickly and easily! [Robert's Rules of Order QuickStart Guide](#) is a short, 200 page book that includes:

- Simple and concise, user-friendly easy-to-read guide covers the basics of the rules most frequently used in conducting and participating in meetings of any size
- Sample statements to get the presiding officer and members confidently through motions, nominations, elections, voting, debates, amendments, and more
- Available app for hearing meetings, tablets, and on track
- A chapter answering the most Frequently Asked Questions
- Handy tables at the back of the book tell you just what to say
- Appointed to a committee? Elected an officer or board member? Chosen as a convention delegate? Chapters on each clearly explain your duties
- Written by the same authorship team as Robert's Rules of Order Newly Revised (RONR) and entirely consistent, with abundant cross-references to the standard book throughout. None in-depth information is needed.

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Pet peeves

- No defined purpose
what do I need to prepare and bring?
- Wrong people invited or left out
- Meeting starts late
- Person in charge won't take charge
- People who show up late, are unprepared and/or want to change the agenda after the meeting starts
- Revisiting discussion items for people who are late
- No identifiable action items or assignments
- No record of decision

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Rule Number 1

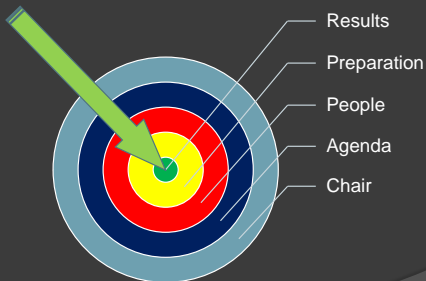
**Start on Time
&
End on Time**

People will be more likely to attend and arrive on time if you have a reputation for charring good meetings

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Resources

- U tube - Meetings Bloody Meetings
- Google – “Meeting Agenda Template”
Tip: try this as an image search
- ISM web site search: Meetings
- www.rulesonline.com

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Turn Your Meetings into Results

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84th Annual International Conference Proceedings - 1999

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Abstract. Effective meetings are built upon a foundation of planning, conducted with structured activities, and guided by effective leadership. The key to success is to involve all the participants in resolving the issues. This paper shows you how.

Meetings are the dialogue of business. They provide a powerful means to find solutions, make decisions, and reach agreements. Yet, many companies waste the opportunity by holding unproductive meetings. When quieter above-the-line executives sit and say, "that's all very nice."

Most bad meetings occur because people treat them like social activities. They invite everyone, set out treats, and hope someone good happens. Then the participants spend endless hours engaged in arguments, chat, and monologues that produce nothing except a decision to call another meeting. As the participants leave the room, they often remark, "Now it's time to get back to work."

Meetings should nurture business. Here are three keys to improving the meetings in your company.

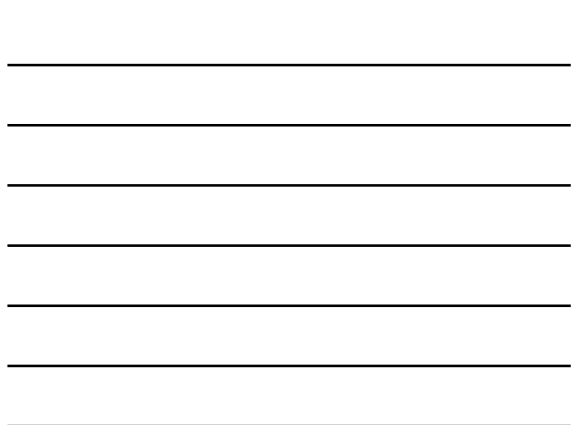
Planning. Every business activity begins with planning. Follow these steps to make sure your meetings produce the results you want.

1. Start by writing clear, complete, specific goals for the meeting. Then test if a meeting is the best way to achieve these goals. Many meetings can be replaced by other less expensive activities. For example, e-mail, voice mail, faxes, and memos often convey information more efficiently than a meeting. Sometimes a phone call or personal visit will resolve a conflict more effectively than a meeting.
Thus, view any suggestion to call a meeting as a challenge to save money and time by finding other ways to deal with the issue.
2. Estimate the value of the results you want to obtain in the meeting. If a result has no value, ask yourself why you want to spend time working on it. Then design an agenda that spends time in proportion to the value of the results. That is, design the meeting like business ventures to earn a positive return on your investment of time and resources. For example, if you are working on an issue worth \$1,000, you may want to spend less than \$500 resolving it. Obviously, spending more than the issue is worth is bad business.
3. Prepare an agenda that contains a specific list of activities. These should guide the participants toward the results that you want. Use structured activities (described below) as much as possible, because these make a meeting more efficient. Avoid unstructured general discussions, because these seldom lead to results.

An agenda should state the activity and the time budget for that activity. For example:

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Take a look around and start meeting like a pro.

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