

# Table of Contents

<b>Introduction</b>	2
<b>Advance preparation</b>	4
What is your specific goal?	4
Should this meeting be held?	5
What type of meeting is it?	6
What is the best setting?	9
Who should attend?	11
Your agenda	12
The invitation	13
<b>Meeting leadership</b>	16
Assigning roles	17
Encouraging participation	18
Staying on track	20
Web meetings	23
Wrapping up	25
<b>Conclusion</b>	28
<b>Appendix I: Visual Aids</b>	30
<b>Appendix II: Troubleshooting</b>	32



*Business meetings are both essential and costly.*

## INTRODUCTION

What makes a great meeting? What makes a terrible one?

This study guide is based on the video training program *The Well-Managed Meeting*. Our belief in creating this program is that meetings can be a powerful business tool. Effective meetings can bring people together to solve problems, share ideas, or focus efforts on a common goal. However, meetings that are not run properly can waste valuable time and fail to meet your objectives.

A number of common pitfalls can result in unproductive meetings. Not having a clear objective. Starting late. Permitting uncontrolled individuals to take the subject matter off in their own directions. Allowing others to remain disengaged, participating on a limited basis or not at all.

The good news is that well-managed meetings have the opposite effect. They can be the most efficient way to accomplish results such as balancing rival interests, informing employees of upcoming changes, or monitoring the impacts of procedures and policies across areas of responsibility and throughout levels of management. They can be very effective in motivating people and creating a team-oriented atmosphere.

Our goal with this study guide and its accompanying video program is to help you learn the skills to prepare and lead well-managed meetings that achieve what they set out to do, respect the value of time, and improve both productivity and morale.

### Thought questions

*How would you describe your attitude toward business meetings in general?*

---

---

*Do the meetings you attend have clearly stated goals? How many achieve these goals?*

---

---

---

*What is the number one problem that you observe in your organization's meetings?*

---

---



*A well-crafted agenda is your best tool  
for staying on track.*

### **ADVANCE PREPARATION**

Without exception, all well-managed meetings begin with preparation in advance. It is not possible for a meeting to be successful if you have not, at minimum, established the criteria for determining whether or not it has met its goal. And this requires defining ahead of time exactly what this goal should be.

#### **What is your specific goal?**

When a problem arises, we are sometimes tempted to “throw a meeting at it.” But merely holding a meeting is no assurance that anything worthwhile will be accomplished.

So your very first step is to stop and create a statement of purpose, clearly specifying your objectives. This is essential. It becomes the foundation on which every other decision about your meeting is based. It will serve as a guide to help you select participants and a location, and it will be the driving force for both planning and conducting your meeting.

Be sure that you write out your statement of purpose. An idea will often seem to be completely clear—until you try to write it down. Putting it in writing will help you confirm whether or not you can precisely describe what you need to achieve in the meeting. Statements of purpose that include phrases like *“to get ideas about,”* *“to get everybody on the same page,”* or *“to review sales results”* are too vague. Work at your statement of purpose until you have a clear and succinct statement that’s easily understandable.

### **Should this meeting be held?**

Once you have a clear purpose, you are then faced with a decision. Is the meeting really necessary? Or is there a better way to accomplish your goal?

Sometimes sending a report is more effective than holding a meeting. For example, detailed listings of new prices or statistics concerning production levels might be better distributed in document or spreadsheet form.

Or if you are seeking information that is not particularly time-sensitive, consider requesting written feedback instead of holding a meeting. Written comments are often better organized and more thoroughly thought-through than spoken comments.

Then there are those problems that simply shouldn't be solved by group participation. Personnel issues, for example, are too delicate for group discussion and should be addressed confidentially, one-to-one. Other problems are too large to be solved in a meeting. They may have to be delegated to a select task force or committee.

Or there may be certain key people who are essential to your meeting's success. If these individuals aren't available, there's no use holding the meeting without them. Reschedule, or cancel and find another way to achieve your purpose.

### **What type of meeting is it?**

Once you have your goal and you've decided to go ahead with a meeting, you need to figure out what type of meeting it's going to be. This helps you prepare and also helps you run it. If it starts out as one type of meeting and then turns into something different, it will become impossible to reach your goal.

- **Information-giving**

*Information-giving* meetings involve the leader or presenter doing most of the talking. These meetings can be for the purpose of informing a group about new policies or procedures, or training them on a new product, or giving them a motivational talk.

Information-giving meetings require practice and preparation on the part of the leader. The information presented must be well organized, concise, understandable, and limited to a few key points.

As the presenter, you should be aware of the principles of good public speaking. Use gestures, voice modulation, and eye contact to reinforce the meaning of your words. Continuously search the faces of participants to determine whether or not they are

understanding your message. If you sense confusion, you may want to request a question. For example, you could say: *“I’m not sure that was completely clear. Are there any questions?”*

However, as long as your audience seems to be with you, it’s better to politely defer questions for later. Allowing your meeting to transform itself into a question and answer session can cause the structure and clarity of your talk to suffer. If questions arise out of sequence, the big picture can get lost and your presentation can come across as disorganized or incomplete.

That being said, questions and group discussion can be very helpful at the end of your presentation. Certain types of information are assimilated more easily if participants are allowed to ask questions and exchange ideas. Group participation also leads to greater acceptance and more productive use of the information discussed.

- **Information-getting**

*Information-getting* meetings occur when you are seeking data, ideas, facts or opinions from the group. These meetings can be for the purpose of determining if new operational procedures are working, for example, or receiving feedback from sales or customer support reps.

Here your job as the leader is to gather information while at the same time keeping the attendees on the subject. You begin these meetings by presenting the topic on which you need their input, then asking open-ended questions. These are questions that can’t be answered by a yes or no and usually start with words like *“who,” “what,” “where,” “when,” “why,”* and *“how.”* In order to keep the meeting focused on information gathering, you’ll want

to discourage discussion and cross-talk and keep the flow of ideas upward from the members of the group to yourself as the leader.

Your intent is to draw upon the knowledge, experiences and insight of those at the meeting. It is essential that communication be open and honest, which requires you to have special sensitivity. Critical comments, interruptions, or even harsh looks can intimidate participants and close off dialogue. Alternatively, giving too much encouragement to one point of view may cause only one side of an issue to be heard. So you have to do your best to keep an open mind and continue to ask follow-up questions until you feel that every voice has been heard.

- **Problem-solving**

*Problem-solving* meetings are for the purpose of finding a solution to a specific company problem. Your responsibility as the leader is to work together with participants to develop a plan that will solve the problem. This requires back and forth communication. You provide the necessary background information and then partner with participants to suggest ideas and explore possibilities.

Leadership of problem-solving meetings requires both skill and judgment. In the course the meeting, you may be called upon to play several different roles. On the one hand, you need to encourage open discussion to allow for innovative problem solving. But you also need to maintain firm control in order to assure that the group remains focused on providing a solution within the time available. You therefore must maintain a balanced leadership style that will keep the meeting on track without discouraging participation. Ultimately, your most important job is to keep the meeting moving toward its goal.

- **Brainstorming**

*Brainstorming* meetings are an extremely effective method for quickly developing new and innovative ideas. These are free and essentially nondirected meetings in which one idea builds on another, and long lists of innovations or potential solutions to problems are generated quickly. Your goal as a leader is simply to lay the ground rules, encourage participation, make sure the ideas are captured, and close the session at an agreed-upon time.

There are three key requirements for an effective brainstorming session: (1) All ideas, no matter how ridiculous they may seem at first, must be presented without qualification or elaboration and without comment by other attendees; (2) All ideas are considered equal; and (3) All individuals present must know that their participation is expected and appreciated.

Brainstorming sessions need not be long. Even a ten-minute session can generate a long list of ideas and a high level of group participation.

Keep these meetings fun and nonjudgmental. Not only will you generate valuable ideas, but your group will benefit from the bonding experience while each individual gains a deeper insight on the subject at hand.

### **What is the best setting?**

Knowing the type of meeting you will be conducting will help you select an appropriate location and setting.

When considering possible locations, look for a site that is quiet, and interruption-free. Take into account subtle characteristics that can affect the outcome. If you want to encourage free and open