“If you had to identify, in one word, the reason why the human race has not achieved its full potential, that word would be *meetings*.”
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Introduction

We live in a meeting world. We meet to share information, make decisions, develop plans, solve problems, recognize accomplishments, and achieve many other things. A lot of people spend a lot of time in meetings. One study showed that the average person in our society will sit through 9,000 hours of meetings in a lifetime—over 365 days. And, organizations spend thousands, sometimes millions, of dollars on meetings.

Many of us groan at the thought of going to another meeting. Why? Meetings often don’t go well. They’re mismanaged. They take too much time, they lack organization, they fail to achieve results, they get off track, they lack clear goals, and they lack effective leadership.

Many of us spend a lot of time preparing for the work we do, but we don’t spend much time learning how to conduct or participate in all of the meetings that go along with getting our work done. This training will help you develop your ability to conduct and participate in your work meetings more effectively.

Learning Objectives

The overall goal of this training is to help you understand and appreciate the WHY, the WHAT, and the HOW, of effective meetings:

As a result of attending this workshop, you will be able to:

1. Describe the benefits and costs of meetings.

2. Identify and describe six key elements for effective meetings.

3. Describe behaviors that help meeting leaders and participants make meetings effective.
Think of meetings you have attended, both good and bad. From your experience, what makes an effective meeting, and what makes an ineffective meeting?

<table>
<thead>
<tr>
<th>Indicators of an Effective Meeting</th>
<th>Indicators of an Ineffective Meeting</th>
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*Effective Meetings – Part 1 – The Fundamentals.doc*
Common Meeting Mistakes

1. Getting off the subject
2. No goals or agenda
3. Too long
4. Poor or inadequate preparation
5. Disorganized
6. Ineffective leadership / lack of control
7. Irrelevance of information discussed
8. Time wasted during meetings
9. Starting late
10. Interruptions from within and without
11. Some individuals dominate
12. Rambling, redundant discussion
13. Nothing seems to get done or decided
14. No published results or follow-up actions
The Benefits of Meetings

We meet for many reasons. We have meetings for giving and getting information, for solving problems and making decisions, for planning events and activities, for creating policies and procedures, and for many other reasons. In other words, we meet to get work done. In addition to getting work done, meetings provide other benefits for individuals and groups. Some of these benefits include the following:

- Help communication
- Get new ideas
- Learn from each other
- Build relationships by working together
- Gain commitment for ideas and action
- Support ability to identify with results
- Achieve a sense of mutual accomplishment
- Feel a sense of belonging
- Have fun

• ___________________________________________________________________
• ___________________________________________________________________
• ___________________________________________________________________
• ___________________________________________________________________
• ___________________________________________________________________
The Costs of Meetings

Understand: Meetings are expensive.

Assume:
- Employees, on average, cost about $200 a day ($25 per hour).
- There are 20 people at a meeting.
- It is an all-day meeting (8 hours).

Calculate:
1. What is the overall cost of the meeting? ____________________
2. What is the hourly cost of the meeting? ____________________
3. What is the cost per minute of the meeting? ____________________

Assume:
The meeting was poorly planned and managed. If it was planned and managed effectively, the meeting outcomes could have been achieved in four hours.

Recalculate:
What amount of scarce agency funds were wasted by this meeting?
________________   (OUCH!)

Bottom line question:
Did you get ________________ dollars of value out of the meeting?
## Overview: How to Do an Effective Meeting

<table>
<thead>
<tr>
<th>Before the Meeting</th>
<th>During the Meeting</th>
<th>After the Meeting</th>
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<tbody>
<tr>
<td>PLAN</td>
<td>START</td>
<td>CONDUCT (Focus &amp; Facilitate)</td>
</tr>
<tr>
<td>Clarify purpose and desired outcome of the meeting</td>
<td>Start with a warm-up</td>
<td>Cover one agenda item at a time</td>
</tr>
</tbody>
</table>
| Identify meeting participants | Review the agenda:  
  - Purpose (task)  
  - Outcome  
  - Topics  
  - Methods  
  - Time allocations | Establish and maintain appropriate pace | Agree on action items:  
  - What needs to be done  
  - By whom  
  - By when | File the agenda, minutes, and other key documents |
| Choose methods to accomplish the meeting’s purpose and outcome, for example:  
  - Brainstorming  
  - Reporting  
  - Analyzing data  
  - Decision-making: ranking, voting, consensus | Set or review ground rules for the meeting | Open discussions | Draft agenda for next meeting | Carry out all assignments |
| Develop the agenda and set the starting and ending times for each item | Clarify participant roles: facilitator, recorder, time-keeper, etc. | Maintain the focus of discussions | Evaluate the meeting:  
  - What went well  
  - Improvements | Set a time for pre-meeting planning |
| Send agenda to participants early | Manage participation | Thank everyone for their contributions and participation |
| Arrange room and equipment | Check decisions | Close discussions |

*Effective Meetings – Part 1 – The Fundamentals.doc*
Six Keys for Effective Meetings

1. **Planning**
   All of the things that must be done to prepare for the meeting

2. **Starting**
   How you set the tone and create the climate for the meeting

3. **Focusing**
   Keeping the meeting on track

4. **Facilitating**
   The many things a leader can do to involve participants, be supportive, resolve conflict, and manage differences

5. **Concluding**
   The way in which the leader ends the meeting to assure that participants feel satisfied with the outcome and that follow-up action will be carried out

6. **Following up**
   The things to do after the meeting

The Two Parts of a Meeting

1. **Content**
   Content refers to what is talked about at the meeting: agenda topics, information, opinions, decisions, action, plans, and meeting purpose.

2. **Process**
   Process refers to how the meeting proceeds and how the group works together to accomplish the purpose and build and maintain cohesiveness.
Planning a Meeting

The First Question: Should We Have a Meeting?

Yes

Meetings can be helpful for:

1. Getting immediate reactions to important information
2. Resolving conflicting viewpoints
3. Tapping the thinking and opinions of others
4. Ensuring understanding and acceptance of ideas
5. Accommodating a group’s desire or need for a meeting

No

Meetings are not needed for:

1. Simply routing information
2. Doing something an e-mail or a phone call would accomplish
3. Getting others’ input when you’ve already made up your mind
4. Working through an issue when there’s not enough information
5. Working through an issue when anger and hostility are too high and people need time to cool off

>>>>> Let’s not waste people’s time! <<<<<
Nine Steps to Planning a Meeting

Key Points

- Thorough planning is critical to the success of a meeting.
- Failing to plan is planning to fail.
- It is important to go through all the steps.

The Nine Steps

1. Clarify the purpose (task) of the meeting.
2. Define the desired outcomes.
3. Design the sequence of meeting activities.
4. Determine attendees, roles, and ground rules.
5. Decide when to meet and when to end.
6. Determine logistics, equipment, and administrative matters, and notify participants.
7. Complete the agenda.
8. Communicate the agenda to participants.
9. Set up the meeting room.
1. Clarify the purpose (task) of the meeting

• **Definition**: The purpose (task) statement is a one-line statement that describes the reason why the meeting is being held. It starts with a verb. Here are some examples:
  - To decide the best way to approach our communication problem
  - To view the training video
  - To hear the report on the conference

• **Examples** of verbs to use in stating the purpose (task): to decide, solve, view, hear, inform, negotiate, listen, review

2. Define the desired outcome

• **Definition**: The desired outcome describes the expected results of the meeting—the product the participants will take away with them when the meeting is over. It can be visible (a written plan) or not visible (new knowledge). It is written with nouns and phrases, not verbs.

• **Examples** of desired outcomes:
  - **Task outcomes**: an action plan, a solution, a decision, an informed group
  - **Process outcomes**: a cooperative attitude, commitment, motivated team members
3. **Design the sequence of meeting activities**

- Always plan an introduction and a summary.
- Consider using an icebreaker at the beginning of the meeting to warm up the group or during the meeting to generate energy.
- Sequence meeting topics using the following considerations:
  - High-priority topics before low-priority topics
  - Logical sequence—e.g., (1) building information, (2) discussion toward a conclusion
  - Standardized sequences such as problem solving
  - Alternating high-energy and low-energy topics
  - Important topics when high energy is expected
  - Allowing staff to present first to encourage participation and dialogue
- Allow sufficient time for an ending.

4. **Determine attendees, roles, and ground rules**

**ATTENDEES: Who should attend?**

**Essential:** People who...
- Have relevant information or expertise
- Will make the final decision
- Are affected by or will carry out a decision
- Might significantly prevent or interfere with the implementation of a decision

**Optional:**
- Individuals with higher functional responsibility
- People with a general interest in the meeting information or outcomes
- Staff or support members who will be indirectly affected by the outcome
- People with similar problems or work situations
ROLES

Group roles or functions are those leadership tasks that can be shared by several people at the meeting. The tasks can be designated ahead of time and announced at the meeting, or the leader can call for volunteers at the beginning of the meeting. Some suggested roles are:

- **Designated leader**: responsible for managing the meeting
- **Timekeeper**: keeps track of time and reminds group of planned start and stop times for agenda items, and assists in maintaining meeting pace
- **Recorder**: keeps a written record of the proceedings
- **Chart person**: writes important discussion points, lists ideas, etc. on a chart to assist with focusing the group’s attention
- **Process observer**: observes and makes comments about how the meeting is proceeding, often referring to the group’s observance of ground rules, and raises the group’s awareness of how it is functioning in relation to accomplishing its objectives
- **Facilitator**: Assists the designated leader in accomplishing tasks and attending to group process, and may simultaneously fill the roles of timekeeper, chart person, and process observer

GROUND RULES

Ground rules are guidelines for desired behaviors that enhance the process of the meeting and assist in accomplishing its purpose (task). They are standards that help clarify expectations regarding participation and can be used to address counterproductive behavior. Some example ground rules are:

- Listen to the person who is talking
- One person talks at a time, without interruption
- Stay on track
- No side conversations
- Be creative
- Communicate directly, honestly, and respectfully
- Hold questions until a person has finished speaking
- Limit contributions to five minutes

It is a good idea to ask a group to suggest changes or additions to add to an initial listing of ground rules.
5. Decide when to meet and when to end

- Hold important decision-making or problem-solving meetings when people have high energy, preferably in the morning; avoid Monday mornings and Friday afternoons as much as possible
- Decide what time the meeting is to begin and what time it is to end
- Set meeting length according to the agenda items, energy needed, and time and logistical constraints (car pools, etc.). Remember, energy usually drops after two hours. Also, try not to exceed six hours, unless it is a meeting retreat with scheduled breaks.
- Set the meeting date for a day when all essential people and information are available. Allow adequate time for attendees to prepare.
- Schedule 10-minute breaks at least every two hours.

6. Determine logistics, equipment, and administrative matters, and notify participants

- **Meeting location**: Choose a meeting room and facility that best supports your meeting purpose (task), desired outcomes, and activities. Favor a larger room for longer meetings, with movable chairs and tables, good ventilation, and lighting.
- **Room layout**: Plan your arrangement of tables and chairs.
- **Equipment and supplies**: Decide what audiovisual and other equipment you will need and supplies such as paper, markers, name tents, tape, etc.
- **Refreshments**: Support participant energy by providing water, and if possible, low-sugar snacks (fresh fruit, cheese, crackers, etc.) and decaffeinated drinks. While it is customary to provide coffee and pastries for a morning meeting and soda and cookies for an afternoon lift, too much caffeine and sugar can cause a subsequent drop in energy.
- **Notification**: Inform participants with a “save the date” e-mail as early as possible so they can put it on their calendars. Let them know more details about the meeting will be forthcoming.
7. **Complete the agenda**

- Include an introduction at the beginning and a summary at the end, allowing five to 15 minutes for each.
- Include the desired result you want for each agenda topic.
- You may elect to ask participants to add agenda items, if they wish. Be sure to assess the amount of time required for each item and record it.
- Write the agenda on a chart so all participants can see it during the meeting.

8. **Communicate the agenda to participants prior to the meeting**

As early as possible before the meeting date, send the written agenda to participants. A few days prior to the meeting, follow up with participants to confirm attendance, share expectations, etc.

9. **Set up the meeting room**

Arrange the meeting room to support accomplishing your desired outcomes and agenda activities. Vary the room layouts depending on the purpose of the meeting. Consider the following options:

- Set up theater-style seating with a podium for one-way information meetings.
- Seat people so they can see each other for information exchange meetings, problem solving, planning, or decision-making.
- Disperse powerful or high-level people around the group.
- Disperse people who have various roles around the group, particularly if the group is fairly large.

Consider equipment and comfort:

- Be sure projectors do not block vision.
- Attend to ventilation, lighting, room temperature, and noise.
- Be sure all needed equipment is in place.
Meeting Planning Worksheet

1. Purpose (Task) of the meeting

__________________________________________________________________
__________________________________________________________________
__________________________________________________________________
__________________________________________________________________
__________________________________________________________________

2. Desired outcomes for the meeting

Task outcomes: _____________________________________________________
__________________________________________________________________
__________________________________________________________________
__________________________________________________________________
__________________________________________________________________

Process outcomes: ________________________________________________
__________________________________________________________________
__________________________________________________________________
__________________________________________________________________

3. Sequence of meeting activities

Introduction: ________________________________________________________
__________________________________________________________________
__________________________________________________________________
__________________________________________________________________
__________________________________________________________________
4. Attendees, roles, and ground rules

Attendees:

____________________     ____________________     ____________________

____________________     ____________________     ____________________

____________________     ____________________     ____________________

____________________     ____________________     ____________________

____________________     ____________________     ____________________

____________________     ____________________     ____________________

____________________     ____________________     ____________________

____________________     ____________________     ____________________

____________________     ____________________     ____________________

Summary: _________________________________________________________

__________________________________________________________________

__________________________________________________________________

__________________________________________________________________

__________________________________________________________________

__________________________________________________________________

__________________________________________________________________

__________________________________________________________________
Roles: Leader: _______________________________
      Timekeeper: _______________________________
      Recorder: _______________________________
      Chart person: _______________________________
      Process observer: _______________________________
      Facilitator: _______________________________

Ground rules:
__________________________________________________________________
__________________________________________________________________
__________________________________________________________________
__________________________________________________________________
__________________________________________________________________
__________________________________________________________________
__________________________________________________________________

5. **When to meet and when to end**

Date of meeting: _______________________________
Starting time: _______________________________
Ending time: _______________________________
6. **Logistics, equipment, administrative matters, participant notification**

   Meeting location:
   
   __________________________________________________________
   __________________________________________________________
   __________________________________________________________

   Room layout/arrangement:
   
   __________________________________________________________
   __________________________________________________________
   __________________________________________________________

   Equipment and supplies:
   
   __________________________________________________________
   __________________________________________________________
   __________________________________________________________

   Refreshments:
   
   __________________________________________________________
   __________________________________________________________
   __________________________________________________________

   Participant notification:
   
   __________________________________________________________
   __________________________________________________________
   __________________________________________________________
7. Agenda

<table>
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<tr>
<th>Start Time</th>
<th>Agenda Topic</th>
<th>Desired Result</th>
<th>Activity</th>
<th>Person Responsible</th>
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8. Communicate the agenda to attendees


Attendee preparation:


9. Set up meeting room


Sample Meeting Agenda

April 1st Meeting
XYZ Project Team

AGENDA

1. Welcome
2. Project background
3. Project status report
4. Problems/issues/concerns
5. Other ideas
6. Close

Why is this sample agenda a good example of a poor agenda?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
Sample Meeting Agenda Format

Meeting called by: ___________________________      Date: ____________________  

Participants: _____________     _____________     _____________     _____________
_____________     _____________     _____________     _____________  

Meeting place: __________________________________________________________  

Start time: _________________________      End time: _________________________  

Please bring: ____________________________________________________________  

Meeting purpose (task): __________________________________________________  
_____________  

Desired outcome(s): _____________________________________________________  
_____________  

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<th>Agenda Topics</th>
<th>Desired Results</th>
<th>Person Responsible</th>
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Estimating Agenda Time Frames

Review of meeting purpose (task), agenda & ground rules 5 to 10 minutes

Development of new ground rules 5 to 15 minutes

Information reports
   For Report 5 to 10 minutes
   For Questions 5 to 10 minutes

Problems that surface from reports 5 to 10 minutes
   (If deferred to another meeting)

Problem solving sessions
   Describe and agree on the problem 15 to 30 minutes
   List possible causes 20 to 30 minutes
   List possible solutions 30 to 60 minutes
   Develop an action plan 15 to 45 minutes

Planning sessions
   Define the scope of the task 10 to 30 minutes
   List activities and develop a plan 30 to 90 minutes
   Review plan for omissions and obstacles 30 to 60 minutes

Decision-making sessions
   Describe the decision to be made 5 to 10 minutes
   Determine criteria for the decision 15 to 60 minutes
   Evaluate options 10 to 60 minutes
   Plan action steps and follow-up activities 10 to 30 minutes
Starting a Meeting

1. Welcome

2. Introductions

3. Icebreaker or warm-up activity

4. Statement of meeting purpose (task)*

5. Statement of desired outcomes*

6. Background discussion*

7. Review or development of agenda*

8. Clarification of expectations

9. Review or development of ground rules*

10. Assignment of roles

*Note
Asterisked items should be displayed in writing on chart paper or on a handout.
Focusing a Meeting

Focusing on the Purpose (Task)

One of the major challenges in leading a meeting is keeping the meeting focused on the purpose (task). Irrelevancies, tangents, interruptions, and other things can throw a meeting off track. There are many ways to make sure the meeting adheres to the agenda:

1. Lead the meeting through the agenda. Take charge. It is your meeting. You are the leader. Use a style of leadership appropriate to the purpose (task), the situation, and the willingness and ability of the participants. Share leadership roles with others and delegate some focusing activities to them.

2. Introduce each agenda item, and state the time available and the desired result.

3. Keep the discussion on track by referring to the following structures:
   - Purpose (task)
   - Desired outcomes
   - Agenda items
   - Ground rules
   - Roles
   - Time limits
   - Set process for each agenda item, e.g., problem solving steps, etc.

4. Use a chart pad and an easel or another visual aid to focus attention.

5. Start and maintain a “parking lot” list of important items not relevant to the present discussion.

6. At the end of each agenda item, briefly:
   - Summarize what was accomplished or decided
   - Identify unfinished business and what to do about it
   - Check for clarity and agreement
Facilitating a Meeting

*Mining Group Gold:*
Facilitating Collaborative Meetings

1. **Prepare for a productive group session**

   Five important planning questions:
   1) What is the **purpose** of the session?
   2) What are the **desired outcomes** of the session?
   3) Who will be the **facilitator, scribe, and time-keeper**?
   4) What is the **agenda**?
   5) How much **time** will be **allocated** for each agenda item?

   If you can’t or won’t take the time to do the simple preparatory work, you haven’t earned the right to convene a group session.

   -- Thomas A. Kayser,

2. **Determine the roles of facilitator, scribe, and time-keeper**

   Whoever carries the **primary facilitator** role is not alone. Everyone else in attendance is expected to be a **secondary facilitator** to help the primary facilitator with the process of moving the meeting along productively.
3. **Initiate and maintain an open and collaborative climate**
   - Present issues so the focus is on the situation, not on behaviors.
   - Present issues so that they encompass common interests.
   - Share your knowledge of the relevant facts regarding topics or issues.
   - Resist the temptation to immediately influence the thinking of the group.
   - Encourage contributions by asking questions and by inviting, reinforcing, and safeguarding participation.

4. **Deal with emotions**
   - **Feelings**: Accept, acknowledge, and process feelings in an organized way so the group can move on to facts.
   - **Facts**: Objectively generate and develop facts so the group can use them to identify and analyze problems.
   - **Solutions**: Have the group generate potential solutions, select one of them, and make decisions about implementing and evaluating it.

5. **Use key meeting tools for facilitating collaborative participation.**
   - **Gate opening**: Inviting a group member to contribute ideas or thoughts on the subject being discussed.
   - **Restating opinions**: Making sure that everyone understands the opinions that have been expressed.
   - **Safeguarding an idea**: Protecting an idea from being prematurely killed.
   - **Role splitting**: When a primary facilitator moves back and forth between functioning as a facilitator and as a contributing member of the group.

**Source:** *Mining Group Gold* (25-minute training video), CRM Films.
Facilitating and Managing Participation, Pace, Behavior, and Differences

A meeting leader must facilitate participant involvement, deal with conflict, manage differences, make sure that everyone is heard, keep communication open, and carry out many other tasks that help participants make a contribution to the meeting and make the meeting worthwhile.

Promoting Participation

1. Specify how you want people to participate, indicating whether you want them to be active, giving ideas and feedback, asking questions, and offering support, or whether you just want them to listen.

2. Encourage participation and clarity in any one or more of the following ways:

   • Get input from frontline staff first.
   • Ask open-ended questions.
   • Use active listening to draw people out; paraphrase; be attentive.
   • Acknowledge and reinforce positive participation both verbally and nonverbally.
   • Ask for concrete examples.
   • Draw out people who have relevant expertise or who are less involved.
   • Be supportive of new ideas, partial ideas, and minority views.
   • Distinguish assumptions from facts.
   • Use a structured activity:
     (1) Ask one speaker to call on the next speaker.
     (2) Specify that no person may talk a second time until all have talked at least once.
     (3) Use a nerf ball and roll or throw it gently to people who have not yet spoken.
     (4) Break the group into subgroups (of no more than four) for assigned tasks.
     (5) Create your own structured activity, e.g., round robin participation.

3. Feel supportive to the group, and you will act that way.
Attending to Pace

1. It is normal for energy to wax and wane during a meeting, causing the pace to speed up or slow down. As a leader, you can balance the pace so people’s energy and interest remain relatively high throughout the meeting.

2. When the pace is too fast or too slow:
   - Make an observation about how you see the pace and ask the group if it agrees with you.
   - Test for completion of the agenda items.
   - Vary your own pace.
   - Break the group into small subgroups (if appropriate to the agenda) and assign a task to each group.
   - Poll the participants as to how they feel about the pace.
   - Take a break.
   - Take a stretch break in place.

Dealing with Counterproductive Behavior

1. Keep calm and feel assertive.

2. Use active listening techniques; paraphrase; summarize.

3. Look for the value of the input and acknowledge it.

4. Refer to ground rules, agenda, meeting purpose (task), or desired outcomes and indicate that the behavior appears to be taking the group away from its task or is counter to the ground rules. Or, ask the person to describe how the behavior relates to the task at hand.

5. Use a “parking lot” list to record tangential or irrelevant topics.

6. Use an “I” statement to describe the behavior and how it is disruptive. For example:

   When you (keep interrupting), I feel (frustrated), because (we’re trying to finish our task today).
7. Ask for cooperation and state what you want.

8. Interrupt the meeting to ask for process observations from the group. For example:

   “How could this meeting be more effective?”

   or

   “How does (the counterproductive behavior) hinder or help the meeting?

9. As a last resort, discuss the behavior privately.

Managing Differences and Resolving Conflict

1. Encourage diverse views to improve quality and creativity.

2. Make sure minority views are heard.

3. Focus on the idea rather than the person.

4. Suggest that each speaker paraphrase the previous speaker before presenting his or her own viewpoint.

5. Set aside a separate meeting to deal directly with the conflict.

6. Use these steps for resolving conflict:
   - Define common ground, areas of agreement, or common goals.
   - Isolate points of disagreement, asking each side to make clear statements and paraphrase everything that is said.
   - Brainstorm or research alternatives to reach agreed-on goals or common ground and diminish differences. Allow sufficient time for alternatives to be generated and discussed.
   - Decide by accommodation, compromise, or consensus on suitable solutions and actions.
   - Plan for evaluation of ideas and solutions.
   - Refocus the meeting.
Concluding a Meeting

1. **Summarize** decisions and accomplishments.

2. **Compare** results with the desired outcomes.

3. **Identify unfinished business** and suggest ways to address these issues.

4. **Complete an action plan** that specifies *who* will do *what* by *when*.

5. **Ask for feedback**, verbal or written, on the *content* and *process*, using the following or similar questions:
   - To what extent did we accomplish our **desired outcomes**?
   - To what extent did we follow the **ground rules**?
   - To what extent did this meeting **meet your expectations**?
   - What did you **like** about the meeting?
   - What did you **not like** about the meeting?
   - What **helped** us in accomplishing our task?
   - What **hindered** us in accomplishing our task?
   - What can we **do better** at future meetings?
   - What do we want to **start doing** at future meetings?
   - What do we want to **stop doing** at future meetings?
   - What do we want to **continue doing** at future meetings?
   - What are we **learning** about the way we operate as a team?

6. **Thank** people for their time and participation and adjourn the meeting.
Improve a Meeting

Identify evaluation questions for improving your meetings. You can ask these questions at the end of the meeting or after the meeting. Sample questions are provided below.

1. Were the meeting purpose (task) and desired outcome(s) clearly stated?
2. Was the agenda specific?
3. Was someone assigned responsibility for each agenda topic?
4. Were time limits set for each agenda topic?
5. Were ground rules identified, agreed to, and monitored?
6. Was the discussion focused on the desired outcome(s)?
7. Was an appropriate pace maintained?
8. Were diverse points of view encouraged?
9. Were the desired outcome(s) accomplished?
10. Were action items assigned?
11. Did the meeting end at the projected time?
12. Additional comments:

__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
Following Up on a Meeting

Important meeting follow-up activities include the following:

1. Write and distribute meeting minutes.

2. File the agenda, minutes, and other key documents.

3. Monitor the carrying out of action items or assignments.

4. Review meeting evaluation information to improve future meetings.

5. Set a time for pre-meeting planning for the next meeting.
Meeting Behaviors for Leaders and Participants

How to Contribute Effectively in Meeting Discussions

Organize Your Contributions
Just as a well-organized speech makes a better presentation, well-organized contributions make better meetings. Rambling, disorganized, disjointed ideas increase the likelihood that the meeting will get sidetracked.

Speak When Your Contribution is Relevant
Before you make a comment, listen to the person who is speaking. Is your comment useful and helpful? Groups are easily distracted by irrelevant comments.

Make One Point at a Time
Even though you may be bursting with good ideas and suggestions, your fellow participants will be more likely to listen to your ideas if you present them one at a time rather than as a string of unrelated points.

Speak Clearly and Assertively
You don’t want to aggressively try to dominate the conversation, but you don’t want to mumble unassertively either. If you do, your contributions may get lost in the shuffle.

Support Your Ideas with Evidence
One of the key determinants of good decisions and effective solutions is the use of evidence to support ideas and opinions. Opinions are ubiquitous: Everyone has one. Facts, statistics, and well-selected examples strengthen a point and help keep the group focused on the task.

Listen Actively to All Aspects of the Discussion
Group meetings provide one of the most challenging listening situations. Several people attempting to make points and counter arguments means that you will have to throttle up your powers of concentration and listening. Checking your understanding by summarizing or paraphrasing can dramatically improve communication and decrease misunderstanding.

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Ten Effective Facilitation Behaviors for Meetings

1. **Paraphrase** what a person has said so that he or she feels understood and so that the other members of the group can hear a concise summary of what has been said. For example:

   So, if I understand you right, you feel we should have a high degree of confidence in our plan before we move forward with it. Otherwise, we could end up wasting a lot of time if it doesn’t work and we have to start over.

2. **Check** your understanding against the words of a participant or ask a participant to clarify what he or she is saying. For example:

   Are you saying this plan is not realistic? I’m not sure I understand what you meant. Could you please run it by us again?

3. **Compliment** an interesting or insightful comment. For example:

   That’s a good point. I’m glad you brought that to our attention.

4. **Elaborate** on a participant’s contribution to the discussion with examples or suggest a new way to view the problem. For example:

   Your comments provide an interesting point from the customer’s perspective. We could also consider how a manager would view the situation.

5. **Energize** a discussion by quickening the pace, using humor, or, if necessary, prodding the group for more contributions. For example:

   Oh, my, we have lots of humble people in this group! Here’s a challenge for all of us: For the next two minutes, let’s see how many ways we can think of to increase cooperation in our section.
6. **Disagree** (gently) with a participant’s comments to stimulate further discussion. For example:

   *I can see where you’re coming from, but I’m not sure what you’re describing is always the case. Has anyone else had an experience different from Terry’s?*

7. **Mediate** differences of opinion between participants and relieve any tensions that may be brewing. For example:

   *I think Chris and Adrian are not really disagreeing with each other but are just bringing out two different sides of the issue.*

8. **Connect** ideas, showing their relationships to one another. For example:

   *As we can see from Gene’s and Danielle’s comments, personal goal setting is very much a part of time management. People need to be able to establish goals on a daily basis in order to more effectively manage their time.*

9. **Change** the group process by altering how information is being gathered or by moving the group to a stage of evaluating ideas that have been placed before it. For example:

   *Let’s break into smaller groups and see if we can come up with some typical customer objections to the plan that was presented this morning.*

10. **Summarize** (and record, if desired) the major views of the group. For example:

    *I have noted four major reasons that have come from the group’s discussion as to why people don’t like attending meetings: (1) they’re not needed, (2) they’re not planned, (3) they’re not managed well, and (4) they don’t achieve anything.*
Reminders for All Meeting Members

1. **Participants do not ignore others’ contributions**

   As participants make comments or ask questions, others show an active interest. Members recognize and respond to the needs of other members. They measure the effect of their remarks in order to continue making valuable contributions and improve their effectiveness as group participants. Silence is not golden.

2. **Clarification precedes evaluation**

   In most meetings these two are reversed—judgments are usually made before members fully know what they’re discussing. If understanding comes first, potentially good ideas are not prematurely killed. Nor is a member likely to feel rejected as a person. If potential conflict seems imminent because of possible misunderstanding, offer to paraphrase or summarize the issues to be sure that real understanding has taken place.

3. **Members speak for themselves**

   Participants accept sole responsibility for their own remarks. They do not mislead themselves by offering opinions that are not their own, or by referring to a vague “most people,” etc. If you speak for someone who’s not present there’s little opportunity for a meaningful give-and-take discussion. State your own ideas as your own.

4. **Ideas are separated from the person presenting them**

   Once an idea is expressed, or a proposal made, try to identify the topic as group property. It’s not “Mary’s idea on …” but “The proposal on …” People should feel free to present an idea, and then join in the discussion and evaluation of the idea without having to defend themselves personally.
5. **All members participate**

While group members do not participate in the same way, they stay actively involved in helping the group move along on its task. For example, when one person presents an idea, others help make sure that it’s understood and organized. Members attempt to fulfill whatever function is appropriate to keep things working.

6. **The group stays conscious of the process**

Occasionally, groups take time out to discuss how they’re working together. Processes are surfaced, evaluated, and worked on. Some symptoms of process trouble are excessive hair-splitting, suggestions that plop, private conversations, two or more people dominating, members taking sides, unwillingness to compromise, and apathy.

7. **Decisions by default are avoided**

An effective work group will make its decisions openly and state what it has decided, rather than to allow decisions to be made by default. Sometimes a group may make a decision and not carry it out. When this happens, the *real* decision was to *not* act.

8. **Conflict is viewed as necessary and helpful**

Effective groups bring conflict into the open and deal with it. Conflict either will be open, and subject to group control, or disguised, and out of control. Sometime it leaves the room and hides in the hallway.
Personal Action Plan

List a few ideas of value that you learned or rediscovered in this training that will help you effectively lead or participate in meetings.

Successful meetings don’t just happen; they’re planned and managed.