The 5Star Service Toolkit

# *Running Effective Meetings*

## *Maximize Meeting Outcomes*

### Plan - Conduct - Conclude - Provide Minutes - Follow Up

**Planning A Successful Meeting**
**- Ten Steps -**

1. Clarify purpose.
2. Create agenda.
3. Determine length of the meeting.
4. Decide who should attend and the best time.
5. Schedule the meeting room.
6. Notify participants as far in advance as possible, identifying the purpose.
7. Follow-up on action items from previous meeting to assure completion.
8. Send out agenda and ask for RSVP *(unless full staff meeting)*.
9. Arrange logistics: room set up, equipment, materials (including previous meeting minutes), and if possible, refreshments. Designate a person to record minutes and possibly a timekeeper.
10. Assure that meeting room is ready on time.

☑ Clarify the **purpose** of the meeting.

… To gain input and ideas
… To convince
… To increase teamwork
… To make decisions
… To share information that is sensitive, confusing, or could be misinterpreted if other forms of communication are utilized.
… To resolve a problem or barrier

**Having regularly scheduled team or staff meetings is an admirable goal. However, the leader needs to make sure that the time spent at such meetings is valuable. Otherwise, the meetings become routine and unproductive.**

☑ Do **not** hold a meeting when…

- Preparation cannot be done or information is incomplete.
- People who need to be there cannot attend. Only allow a substitute if the person attending is authorized to make decisions.
- Anger and hostility are too high between the parties involved for the individuals to focus on the issues at the meeting.

- Specific individual(s) need "fixing," while others are doing a good job. The ones who need to "get the message" usually do not absorb it by a general reminder in a meeting. Also, it is very discouraging to those doing a good job.

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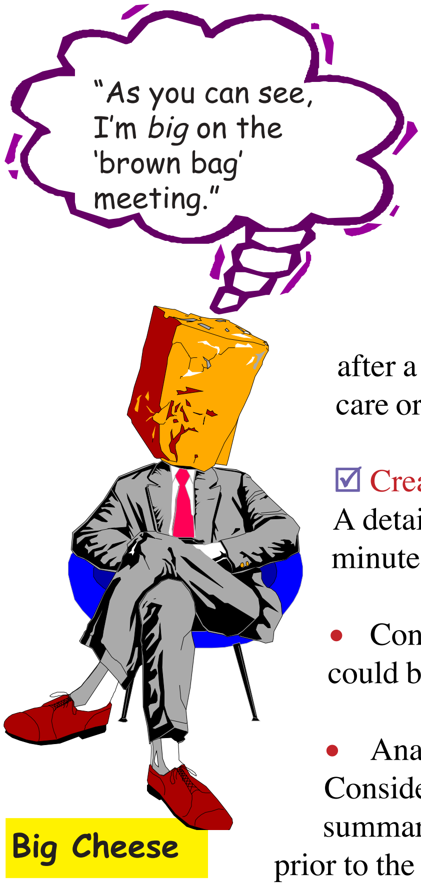


☑ Have the **"right" people** at the meeting.

•Consider each person's expected contribution to the desired meeting outcomes. Factors to consider are the person's knowledge, experience, and impact of any decisions made.

•Determine the best time and length of the meeting for the attendees. Consider work and home responsibilities. For example, just before or after a shift change may be good for the manager, but it may impact patient care or the attendee's outside responsibilities.

☑ Create the agenda

A detailed, realistic agenda serves as a roadmap for the meeting and guides the minute taker/recorder.

- Consider the purpose of the meeting and brainstorm topics or issues that could be addressed.

- Analyze each topic to see if it could be handled in another manner. Consider the following to save time at a meeting: Share information via short summary reports, bulletin board postings, newsletters, and e-mail messages prior to the meeting. Use meetings to answer questions and gain input. Create sub-groups to work on task assignments and have them bring recommendations to a meeting to get faster action. Experiment with brief questionnaires or polling, to assess attitudes and reactions and to generate discussion prior to the meeting. Hold one-on-one meetings to take corrective action that is not relevant to the entire group.

- List final topics for the meeting in the order of priority.

- Decide on the length of time needed for each topic. It is best to over-estimate the time.

- Leave time at the beginning of the meeting to review the purpose of the meeting, any ground rules, and other introductory information.

- Schedule time at the end of the meeting to recap key decisions and to clarify any responsibilities and due dates.

## Sample Agenda

**Name of the meeting or group**

**Logistics** - Date, start and end time, location, and leader's name with extension.

**Brief Statement of Purpose(s)**

**Topics/Issues in the order to be discussed**

- Outcomes expected, if appropriate for the topic
- Time allotment per topic
- Person who will lead each topic discussion - Include others in addition to the leader to increase attention and the feeling of involvement.
- (Optional) Method of delivery, i.e. presentation, discussion, brainstorming ideas, work in groups, etc.

**Break times** - Schedule breaks if meeting lasts more than 60-90 minutes.

**List of invitees with department/unit** - Not necessary for a full staff meeting or an exceptionally long list.

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☑ Distribute agenda

Send agenda as an attachment to an e-mail three to seven days prior to the meeting, depending on the extent of preparation needed by the attendees.

- Thank invitees for agreeing to participate.
- Highlight date, time, and place.
- Explain any pre-work expected of participants.
- Indicate to RSVP to whom and by when.

## Conducting the Meeting

☑ Begin the meeting within **5 minutes** of the published start time. This creates a serious, respectful tone.

☑ Cover introductory information.

- **Welcome the participants** and thank them for taking time from their busy schedules.
- **If people do not know each other**, allow time for introductions.
- **Pass around the attendance sheet.** When the group is large, have the attendees print and sign names, including their department/unit and extension.
- **Address housekeeping issues**, if appropriate. Advise if there will be breaks and when. Indicate location of the restrooms and telephones.
- **Review "Meeting Ground Rules."** Rules create a sense of fairness, allow meetings to run more smoothly, and encourage participation. Involving participants in setting rules is highly recommended for on-going teams/task forces. If rules are violated during the meeting, refer the group to them. It is very helpful to list the agreed upon rules on flip chart paper.

### Common Ground Rules...

- Put cell phones and beepers on vibrate mode. If necessary, leave the room to respond to a call. Urge participants to limit calls during the meeting to enhance focus.
- One person speaks at a time.
- Everyone has the right to speak his/her views. No personal attacks.
- Avoid side conversations.
- Maintain problem-solving, rather than a complaint focus.
- Stick to the agenda and timeframes, unless group decides to extend the meeting or eliminate topics.
- A "Parking Lot" list will be used for topics or issues that cannot be covered in the meeting but are of interest to the group.

- **Briefly overview the purpose of the meeting and the agenda.** Have extra copies of the agenda on hand and the minutes of last meeting, if appropriate.

- **Identify minute taker/recorder and timekeeper.**

☑ Work efficiently through your agenda

- **Focus on the desired outcomes.**

- **Keep to the time schedule.** If more time on an agenda item is needed, confer with the group to decide how to proceed. The group can decide to stop, postpone, or continue the discussion. If the group decides to continue the discussion, the decision must be made to either postpone some topics (and which ones) or extend the meeting (for how long).

☑ Manage challenging participants and situations

- **For the complainers**

  - Repeat the person's concern and verify understanding of the issue.

  - After the issue is clear, look at the person briefly and then redirect your focus to the rest of the group. Doing this allows the presenter to take control and redirect the discussion.

  - Check to see if others in the group feel the issue is important to discuss. If yes, then select the appropriate action from the two choices below:
    a) If the issue is related to the agenda items, indicate that you will take their concern under advisement. Encourage the person to be part of the solution (not part of the problem). Ask the complainer to work on this issue further and form a task group. This, then, becomes an action item for the minutes.

    b) If the issue is NOT related to the agenda items, indicate that it sounds like an issue to consider in more depth. Put the issue on the "Parking Lot" list. After the meeting, investigate and attempt to involve the dissatisfied employee in creating recommendations for solution.

  - If a person continues to be disruptive, speak with the person outside the meeting to assess the situation and determine appropriate action.


- **For the dominators of the discussion**

  - Physically stand behind the person.

  - Look to others in the group for responses.

  - Thank the person for the contribution and say, "Let's hear what others have to say on the issue."

- **For those having "side conversations"**
  - Indicate you would like their input for the whole group to consider.
  - If necessary, remind them of the rules and encourage them to stay with the group.
- **For the unprepared group or individual participant, consider**
  - Was the agenda distributed with enough advanced notice?
  - Is the agenda clear in its purpose and expected outcomes?
  - Are the right people in attendance at the meeting with the information needed and power to act?
  - Does the group feel there is missing information?
  - Does the group want to continue with the topic, go on to another agenda item, or reschedule the meeting?
  - Was the pre-work completed?
  - If it is only certain individuals who are unprepared, then have an off-line discussion with each individual. If no change is noted after the off-line discussion, contact the person's boss.
- **For participant put on the "hot seat" or attacked**
  - Act immediately to defuse and refocus.
  - Steer conversation back to the goal and solution needed, rather than towards blame.
  - Speak about the future, not the past.
  - If useful, call attention to "ground rules," such as listening to others and not interrupting.
- **When conflicts or arguments arise**
  - Listen. Show respect and empathy to reduce defensive behavior.
  - Clarify the outcome desired.
  - Clarify opinions of both sides. Positions may not be as different as originally thought.
  - Determine the common ground between the two opinions.
  - Do not permit blaming. Remain solution-oriented, working towards a win-win resolution.

- If necessary, remind them of the "ground rules."

☑ Encourage participation

- **Keep a pulse on reactions by continuously scanning the group.** When non-verbal cues indicate negativity or confusion, stop and check with the group.

Harold practices his newly acquired yoga pose, "stretch of the painfully bored corporate man", as he struggles to regain consciousness during the monthly sales meeting.

- **Try various techniques to increase interactivity.**
  - Talk less and ask more open-ended questions.
  - Sit down after you speak.
  - Move away from the front of the room after you have asked a question or raised an issue.
  - Encourage a person who is quiet to share his/her thoughts.
  - If the whole group is not responding, state that you need their involvement for the meeting to achieve its goals, and then wait for a response.
  - Ask for a poll on a particular issue so you hear from everyone.
  - Narrow the focus of questions. If a question is too broad, people may not respond due to lack of clarity.
  - If lots of negatives are brought up about an issue, indicate that there is always <u>something</u> positive and ask for suggestions. Conversely, if all responses to an issue are positive, ask for the negatives or you may not hear the downside before it is too late.
  - Consider alternate group methods such as sub-groups and the devil's advocate position.

## Concluding The Meeting

☑ **End your meetings on time.** It is beneficial to announce that the meeting will be ending soon (15 minutes or so before the end) and to check if there is any business that must be concluded during the meeting that has not been addressed or cannot wait for the next meeting.

☑ **Summarize** what has been accomplished and what needs to be done by whom and by when.

☑ **Review any** "Parking Lot" items and assure that these will be addressed.

☑ **Ask for participant feedback** on the process of the meeting. What worked? What could be improved?

☑ **Thank people** for their time and participation and officially state that the meeting is adjourned.

## Minutes

☑ Whenever possible, the leaders should NOT take the minutes. The leader needs to focus on facilitation of the meeting.

☑ **Type** up the minutes within **one to two days** after the meeting.

☑ Get **review and approval** of the minutes by the meeting **leader**.

☑ **Distribute within a week** to all "invited participants." Include any handouts distributed for those who were not able to attend.

☑ Write minutes in **concise phrases** and not full sentences.

## Sample Minutes Format

| | | | |
|---|---|---|---|
| **Name of meeting**<br>**Meeting Leader(s)**<br>**Recorder** | | **Date of meeting**<br>**Start and end time of meeting** | |
| **Topic** | **Outcomes/Recommendations** | **Actions** | **Follow up** |
| Follow agenda items. | Use bullet format for ease of reading.<br><br>If a **topic was informational only**, summarize the key points in bulleted format. | Indicate "Informational" and identify how to get more information on the topic, if desired. | Person responsible and date |
| New row is used for each topic. | | | |
| **Present:**<br>**Absent:** | | | |

## Follow-up by Leader after the meeting

☑ **Check minutes for accuracy, and ensure prompt distribution.**

☑ **Reconfirm with those responsible for action items** to assure clarity of responsibilities and timely progress.

☑ **Follow up on "Parking Lot" items.** Explore issue and, as appropriate, establish special groups to research and/or make recommendations.

☑ **Continually evaluate your meeting management skills and work towards enhancements.** Ask for feedback both during the meeting and at the end. Before the meeting, request a colleague to give you feedback after the meeting.