Running Effective Meetings

MTD Training

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Preface

Throughout your commercial career you will attend a lot of meetings!

Some meetings are more productive than others and it all comes down to the way that the meeting is set up and run.

We've all attended meetings that have been a complete waste of time where everyone "talks a good game" but no action actually comes from it!

In this textbook we'll cover the main key considerations, skills and approaches to make sure that the meetings that you run are focused, outcome orientated and focused on getting action.

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1 Introduction

1.1 Overview of the Ebook

We have all been to meetings that, when we left, we knew had been a waste of time. In fact, we can feel as if we spend the majority of our day in meetings. However, few meetings are run as effectively as they could be. In this ebook, you'll learn how to run an effective meeting by looking at several different topics:

- Why are you holding a meeting (what's the meeting's objective)?
- Scheduling the meeting
- The meeting agenda
- Before the meeting
- General operations during the meeting
- Basic communication skills for meetings
- Working effectively in a meeting
- After the meeting

1.2 Why Are You Holding a Meeting?

Many meetings we attend are unnecessary. In this chapter we'll look at when it is appropriate to hold a meeting, as well as when it is not. We'll also talk about the importance of clarifying your meeting's objectives. Otherwise, why should anyone come if you don't even know what it is you want them to meet for?

1.3 Scheduling the Meeting

So, you want to meet on Thursday at 4:00 p.m. for 30 minutes. But the next thing you know, people can't come, they want to have the meeting last longer or shorter, or they would rather you hold the meeting at a different location. Yes, it can be frustrating to schedule a meeting with multiple people who all have their own schedules and their own priorities. But in this chapter we'll look at some tips that can help you do so.

1.4 The Meeting Agenda

What do you think of when you think of a meeting agenda? A piece of paper with a list of a few topics on it, right? Well, we're going to look at the meeting agenda as a tool that can help you to be much more effective in a meeting – and can help everyone else to do the same as well. How many times have you expected someone to be prepared for a meeting but they show up and haven't done any of the preparation necessary? Or have you ever had someone show up, look at the agenda, and determine that really the person who should be there from their department is Steve, who is on vacation for the next week.

In this chapter, you will learn that the meeting agenda is the key to running an effective meeting. When you use it appropriately and to its fullest potential, it is a means of gaining agreement regarding the meeting objectives, a way to prepare the participants for what is expected of them during the meeting, and a tool that will help you keep the meeting on track.

1.5 Before the Meeting

Once you've sent out the agenda, there are just a few things left that you need to handle before the meeting. In this chapter we'll take a look at these items and share some information that will help you make sure that the meeting runs smoothly. There are also some things you should consider about the location that you choose and the set-up of the meeting room itself.

1.6 General Operations During the Meeting

Now that you've planned for and prepared for the meeting, it's time to get into the meeting itself. But how do you run an effective meeting? What do you need to do or not do? We'll talk about strategies for effectiveness in this chapter. The first step is to agree with the group on what the ground rules will be for the meeting. For example, you might agree to take two breaks, one after the first hour and one after the second hour. Or you might agree as a group that you will raise your hand and wait to be acknowledged before speaking. Ground rules are particularly important when your meeting will cover controversial subjects or when you expect there to be some level of conflict between the meeting attendants. We'll also talk about some additional ways to manage the meeting so that you stick to the agenda and achieve your objectives.

1.7 Basic Communication Skills for Meetings

What is a meeting but an organized form of communication? You need to be able to listen to others, digest information, and communicate back to the other people in the meeting. We'll briefly look at some basic communication skills that will help you to communicate effectively during your meeting.

1.8 Working Effectively in Meetings

In this chapter, we'll look at some skills that will be useful in the middle of a meeting such as how to brainstorm effectively, problem solving skills, persuasion skills, and more. The goal of this chapter is to help you lead the group through the meeting agenda and towards the accomplishment of the meeting objectives.

1.9 After the Meeting

Your job isn't over just because the meeting is. In order to make sure that the time you and all the other participants spent in the meeting wasn't wasted, there are some steps you need to take after the meeting. You'll want to get feedback on how the meeting went, send out the meeting summary or minutes, and follow-up on the tasks that were assigned during the meeting.

2 Why Are You Holding a Meeting?

2.1 Introduction

Meetings, meetings, and more meetings. It can seem like we spend the majority of our professional lives in meetings. But many of these meetings are not necessary, are not productive, and end up being a waste of time. Not just of your time, but the time of everyone that comes to the meeting. If travel is involved, catering was ordered, or any other expenses incurred, the meeting can be a very expensive production. In this chapter we'll discuss how to determine whether or not a meeting is truly necessary.

2.2 The Meeting's Objective

Before you can determine whether or not you truly need to hold a meeting, you need to determine what the objective of your meeting would be. Why do you need to meet? If you don't know what you are trying to achieve, then you will be wasting time if you do meet. Meetings can have more than one objective. To help you determine what they might be, ask yourself the following or similar questions:

> If you don't know what you are trying to achieve with your meeting, then any meeting you have will be a waste of time.

- Are you trying to make a decision?
- Do you need to brainstorm new ideas?
- Are you checking in on progress or status of a project?
- Are you starting a new project?
- Do you want to communicate something?
- Are you planning something?
- Are you celebrating something?

Your meeting objectives are the measuring stick you will use when the meeting has been held to determine whether or not your meeting has been productive. If you leave the meeting and you have achieved your objectives, the meeting was successful. So, complete the following sentence:

At the end of the meeting, I want the group to....

When you fill in the rest of that sentence, you should know what your main objective is.
Here is an example of a poor objective:

To discuss the upcoming fundraiser.

This is not a good objective because there is no specific outcome. You could discuss the fundraiser for hours, but what is the true outcome that you want after the discussion is over? Some possibilities of true meeting objectives for this meeting might include one or all of the following:

- To decide on the date and time of the fundraiser
- To determine the invitee list
- To identify a list of at least 20 potential corporate sponsors
- To assign roles to committee members (volunteer recruitment, sponsorships, invitations and RSVPs, silent auction coordinator, decorations)

You should be able to use the objective to help you determine whether or not a meeting is absolutely necessary as well as who you need to invite to the meetings.

2.3. Is a Meeting Necessary?

Many meetings that we hold or attend are not actually necessary. However, knowing the objective doesn't mean that you have to have a meeting to achieve it. Ask yourself why you think a meeting is the best means to achieving your objective. Often you could achieve the same objective by picking up the telephone for a few minutes or by sending out a couple of emails. The times that you need to hold a meeting are more limited than you might think.

> Often we could achieve the same objective just by picking up the telephone for a few minutes or by sending out a couple of emails.

Some good reasons to hold a meeting are:

- You need people from multiple points of view or departments to generate ideas together
- You need the team to feel ownership of whatever decision is made by having had a hand in developing it
- Clear communication requires a face-to-face presentation
- Input from multiple departments is needed and each department's information may affect the other departments' input
- You need to build affinity between team members
- You expect the objective will be controversial
- The issue is urgent and reaching a decision is more important than whether or not a meeting is truly necessary
- Other attempts at reaching the objective (telephone or email) have been unsuccessful or are taking too long

One word of caution about using email as a means to achieving your objective: too often, people have long, drawn-out discussions via email. While this can be effective in some decision-making, it can also leave a great deal of room for misunderstanding or miscommunication.

In face-to-face communication, over 90% of what we are communicating is non-verbal: our body language, tone of voice, and speed of speech. In email communication you are relying on only the verbal portion of communication. So don't allow email communication to go on for too long or to occur at all if the topic is highly technical or very important.

2.4 Who Should Come to the Meeting?

When you have decided that a meeting is the best choice for achieving your objective, the next decision you need to make is whether or not everyone you first think to invite to the meeting actually needs to come to the meeting.

Think about this for a moment:

10 people in a meeting x average salary of $30 an hour = $300 per hour

So if this group of 10 people has a two-hour meeting, the cost to the organization for the meeting is $600. Not to mention the loss of whatever work the people could have completed had they not been in the meeting. So before you invite someone to the meeting, ask yourself if they really need to be there. Ask yourself the following questions:

- Are they important to the discussion?
- Do they have expertise that we will need that no one else attending has?
- Is this person's agreement to what we decide necessary for us to move forward?
- Do my organization's internal politics require that this person be invited?
- Do I expect questions to arise during the meeting that only this person can answer?

If you can achieve your objective without this person, why are you considering inviting them to the meeting? Sure, there are times that the politics of your organization mean that a particular person should be invited. For example, perhaps this is a meeting where all the other department directors are coming, so to leave the final department director out might be unwise. But most of the time, you should limit the meeting's attendees to those people who are absolutely necessary.

3 Scheduling the Meeting

3.1 Introduction

When you have decided that a meeting is necessary, now you need to schedule the meeting. If you are the supervisor of the entire group that needs to come to the meeting, then this might be easy for you most of the time. But in many cases it is a challenge to schedule a meeting with the busy schedules that we all have.

3.2 Common Problems When Scheduling a Meeting

We've all had the experience of trying to schedule a meeting that seems more like an attempt to solve a brain teaser than to get a few people together. Here are some common problems that occur when attempting to schedule a meeting:

- You announce a date and time, but multiple important attendees cannot come so you have to propose another date.
- Rather than announcing a date, you propose choices but there are too few choices available so you cannot find a common date.
- The meeting date and time are confirmed but then something "comes up."
- The meeting location is changed and although you send out a message to that effect, some people still go to the wrong location and miss the meetings.
- Too many messages go around about the meeting so that in the end, people are confused about the date and time.
- You attempt to use your organization's intranet-scheduling system but you either don't have authority to schedule for all of the participants or you need to schedule for people outside of the system as well
- Or, you attempt to use the internal scheduling system to schedule a meeting and find a date and time that works – only to get responses from the participants saying they hadn't updated their schedules on the system so they aren't really available at that date and time.
- You schedule the meeting only to find out that the location you needed to use is already booked.
- No reminder of the meeting is sent, so people forget and don't show up.
- You weren't told clearly what the meeting was about. So you arrive only to realize that another member of your team should be there instead of you or along with you.

Many of these probably rang true for you. Whatever the reason for having a problem with scheduling a meeting, the results are the same:

- Time is wasted
- Wasted time means wasted money
- Wasted time and money means inefficiency
- You are simply frustrated!

3.3 Tips for Scheduling a Meeting

One way that can be effective when scheduling a meeting is to use an internal scheduling software – as long as it is a requirement that everyone use the software. If you only have a few people using it, the software can end up causing more problems than resolving them. However, there are some other things you can do to help you be effective when scheduling a meeting. Some suggestions include:

- Determine which participants must be there and which participants are optional
- Determine if it would be acceptable for the participants to send one of their own team mates or employees in their stead
- Determine whose schedules should be accommodated and who you will expect to change their own schedules to accommodate the meeting (this might not always be possible to determine)
- Decide if your priority is getting everyone together, whenever that date might be, or if your priority is to find the soonest time that most people on the attendee list can make it
- Determine ahead of time what kind and size of room you will need as well as what kind of audio visual equipment you need
- Identify any existing, standing meetings that you know some of your attendees will be in and eliminate those dates / times as possibilities
- Find several dates and times that such a room is available and that don't already have a standing meeting happening during that time
- Propose at least three dates and times and ask participants to rank them in order of preference and to indicate with a "0" a meeting time that they absolutely cannot attend
- Give the participants a deadline for responding with their preferences
- Call anyone who did not respond before the deadline – or at least those people whose attendance is vital to achieving the meeting objective
- Send a confirmation of the meeting date and time one week and one day before the meeting

If you are launching a new project that will require regular meetings, don't worry about scheduling all of them before you've met the first time unless you have some urgent reason to do so. Instead, wait until you've held the first meeting to make sure that the people you've invited are actually the right people to participate on the team. Then you can decide as a group when the next meeting(s) will be.

4 The Meeting Agenda

4.1 Introduction

It is not an understatement to say that your agenda and the way you use it can be the key to whether or not your meeting is successful. The agenda is not just a list of what is going to happen or what you are going to discuss at the meeting. It is also:

- A means of identifying anything you might have missed
- A tool for ensuring everyone has the information they need to be productive at the meeting
- A tool for ensuring that the right person actually comes to the meeting
- A tool for managing the meeting while it is in operation
- A confirmation of the meeting date, time, and location

4.2 The Agenda Format

The exact appearance of your agenda is not as important as making sure that it includes all of the following information:

- Meeting date and time
- Meeting location

- Scheduled meeting duration
- Meeting purpose (description of meeting objective(s))
- What to bring to the meeting
- What to read before the meeting
- List of individual items or topics, each with
    - Time allocated to discussion in minutes
    - Topic leader or responsible person
    - Objective

You can also choose to include a list of the people who will be attending and their titles, particularly if the group doesn't know each other or if there will be people attending from outside the organization. An example of a possible agenda format is shown in Figure 1.

Agenda			
Date:	Time:	Duration:	Location:
Purpose of Meeting:			
Please Bring:		Please Read:	
Topic / Item	**Time Allocated**	**Topic Leader**	**Objective**
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			
11.			
12.			

Figure 1: Sample Agenda Format

Each section of the agenda provides information that will inform the attendee, make sure that they are prepared, and help you control the meeting once it starts. Let's review each section that we haven't talked about yet.

- Meeting Purpose – this is an overall description of your objectives. For example, you might say, "to make decisions regarding the golf fundraiser for 3rd quarter."
- Please Bring – in this section you identify what you want everyone at the meeting to have with them. Don't worry about being obvious – err on the side of being thorough. This section could include things like:
  - your calendar
  - contact information for potential sponsors you've identified
  - names and contact information of at least three potential volunteers
  - your copy of last year's golf event marketing information
- Please Read – here you would indicate any information that you want attendees to read before they attend the meeting. Be sure that if you are providing the information that you attach it to the agenda when you send it out! In fact, it is always better to err on the side of providing the information again rather than risking that the participant won't have it. For our golf fundraiser example, you might include things like:
  - The attached sponsorship letter
  - The email dated xx/xx/xx from the marketing department
  - The attached notes
- Topic / Item – here you list out each topic or item that needs to be covered in the meeting. The topic will then correspond to a desired outcome. For example, the topic might be "fundraiser date" and the objective would be "decide date." Or, let's say that your meeting is about all of the fundraisers that you want to have in the third quarter. Then your topics might be:
  - Golf fundraiser
  - Solicitation letter
  - Silent Auction and dinner

  And each one may have multiple corresponding objectives.

Time Allocated – Here you give the amount of time to be allocated to each topic. Be sure that the total amount of minutes that you indicated on your agenda does not exceed the overall duration of the meeting that you have indicated at the top of the agenda. This information will be helpful to you as you progress through the meeting because you can use it to manage the conversation. We'll talk more about using the agenda during the meeting in later chapters.

Topic Leader – just because you are organizing the meeting, that doesn't mean that you will be leading the discussion on every topic. In this column you should indicate who will be the discussion leader. This could be the person who has the most information on the topic, the person who raised a concern that got the topic placed on the agenda, or the main decision-maker over the area that the topic concerns. This is also an indication to the person that they should be prepared to act as the discussion leader during the meeting.

Objective – as we've discussed, this is where the objective or objectives should go. Don't be afraid to list several objectives under each topic. You want everyone to know what you expect to achieve at the meeting so that they are prepared to do so.

4.3 How to Use the Agenda

Once you have completed the agenda, you should send it out to your meeting participants for comments, changes, or additions. You may hear back that they have something important that they also need to discuss at the meeting, and you want to know that ahead of time rather than waiting until the meeting and having them bring it up when there is no time allocated for it on the meeting schedule. Give the group of people a deadline for responding to the agenda if they have any changes.

Once you've received their changes (or lack thereof), you can make any necessary changes and send the agenda and the associated attachments back out. At this point, you should consider the group of people as having committed to the agenda as-is. Then before and when you get into the meeting, the agenda will serve several purposes. It will:

- Serve as notice to the participants of what they are expected to read or prepare before the meeting, reducing the chance that you'll have a bunch of unprepared people who aren't ready to make needed decisions.
- Serve as notice to the participants of what they are expected to contribute to the discussion.
- Serve as a guide for directing discussion during the meeting
- Serve as a 'checklist' to make sure you have accomplished everything you do

You have basically used the agenda as a means of getting agreement from the group of participants as to what will happen during the meeting and what will be decided. That should make it much easier for you to keep everyone on task and moving effectively through the discussion.

5 Before the Meeting

5.1 Introduction

There are certain tangible aspects of effective meetings that should be considered if your group is to be as productive as possible and if you want to have the best attendance as possible. In this chapter we will look at a few areas of consideration that will help you ensure that your meetings are set up appropriately and that you've thought of details that will help foster a productive meeting environment.

5.2 Meeting Location

When you consider the meeting location that you want to use, there are a few aspects to consider. These are:

- Convenience
- Comfort
- Suitability

5.2.1 Convenience

First, you should consider what location would be the most convenient for your participants. If you have multiple meetings for this project, look for a variety of locations so that you vary the distance that people have to travel each time. Also consider parking. Is there plenty of free, close parking or will the participants have to fight for metered spaces? You want to communicate any specific parking information to the participants when you send out the agenda so that people allow sufficient time for parking and walking to the meeting site.

5.2.2 Comfort

When you consider the comfort of various locations, consider several aspects:

- Size – is there enough room for everyone to feel comfortable? A tight, close room can increase the temperature or add to the stress level if you have a difficult topic to discuss.
- Temperature – do you have control over the thermostat? If the meeting is going to be after traditional work hours, will the meeting room remain climate-controlled during those hours?
- Access – have you thought about access to the meeting space for those who might have mobility issues or physical handicaps?
- Seating – is there sufficient seating for everyone? If you have people with physical issues, have you provided a variety of seating options?

5.2.3 Suitability

Finally, have you considered how suitable the location will be? For example, if you are having a meeting to discuss sensitive information, can you be sure that the location you've chosen will allow for privacy? If you are going to need to do an audio visual presentation, is there equipment available for your use there, or will you have to bring everything with you? Here are some other questions to consider:

- Is there space for setting up any display equipment?
- Will there be noise issues from other groups?
- Is there room to move around if you will be doing team-building or other activities?
- If you want to provide them, does the location allow you to have refreshments?
- Is the atmosphere of the room appropriate for the formality of the meeting?

5.3 Seating Arrangement

When you have decided that the location is comfortable, convenient, and suitable, now you need to consider the seating arrangement. For example, will you be assigning seats by putting tent cards out at the spaces, or will you be allowing people to sit wherever they choose? When you think about the purpose of your meeting, there might be some advantage to having certain people sit next to each other.

Next you should think about the arrangement of the tables and chairs in the room. If your meeting is more of an instructional session or if you are just disseminating information, you might choose to set the tables and chairs up in rows. But if you are going to have a discussion or brainstorming session, the best arrangement would be to set the chairs and tables up in a 'U' shape so that everyone can easily see and listen to each other.

5.4 Meeting Preparation

The day before the meeting, send out a reminder email to all of the attendees. Next, mentally walk through the meeting to determine what you need to bring with you. Decide whether or not you will bring copies of any supporting information, such as the things you asked them to read, to the meeting. If so, make the copies the day before as well so that you avoid any last-minute problems. If you are bringing other items to the meeting, pack a box the day before so that you are prepared. For example, do you need white board markers? Name tags? It's never a bad idea to bring pens and pads of paper to the meeting as well, if you have them.

6 General Operations During the Meeting

6.1 Introduction

In this chapter we will look at several techniques to help you operate during the meeting. You may not need to apply all of these to your meeting. It depends on the type of meeting you are having, the level of conflict you expect, and how well the group you have coming knows each other. However, these tips are designed to help you have more effective meetings by using your time well and helping you achieve the goals you set for the meeting.

6.2 Laying the Ground Rules

In some meetings, when you have a good group that works and brainstorms well together, you don't have to worry about ground rules. Particularly if you will be meeting for multiple times, the first meeting is a good time to focus on how you would all like the meetings to operate so that you get the most done in the shortest amount of time and without anyone getting too upset. Some possible ground rules are things like we will:

- start every meeting on time
- end every meeting on time
- agree to come to the meeting prepared (having read the materials, etc.)
- all participate
- have a break after 90 minutes (or whatever works best for you)
- stick to the agenda
- arrange a time to discuss issues that arise that are not on the agenda
- disagree respectfully
- follow through on our commitments

You can make a list of these ground rules ahead of time that you propose to the group at the first meeting, or you can allow the group to come up with their own rules. Either way, you want to make sure that you have agreement on the ground rules before moving forward.

6.3 Running the Meeting

During the meeting, your job as the meeting organizer is to move the group through the agenda. Make sure everyone has a copy of the agenda when the meeting starts, and progress through the topics in the order they are listed on the agenda. Someone needs to be assigned to take notes during the meeting if you are not able to. If something comes up that is not on the agenda, assure the group that you (or the assigned person) will capture that topic or item for later discussion. However, if the item that came up somehow impacts your ability to complete the rest of the agenda, consider handling it then – but explain to the group why you are allowing this deviation from the agenda.

If discussion is continuing on a topic and you are about to come to the end of the time you have allocated for the item, ask the group to do one of several things:

- Make a decision so you can move on
- Agree to stay longer if they want to continue the discussion
- Agree to postpone the decision on this topic to a later time so you can stay on time

Here are some additional tips for helping the meeting to be as effective as possible:

- Watch for people who are dominating the conversation. If you feel that someone is indeed dominating the topic, ask other people in the room for their opinions
- Keep a list of tasks that arise during the meeting, as well as who will be responsible for the item(s) and by when
- Keep a list of questions that arise but that can't be answered by the group in the meeting.
- Briefly summarize the decision made at the end of discussion for each item. This gives you the chance to correct misunderstandings
- Write down the decision as well as voting information (if that is required)
- Watch the body language of the people in the meeting. Are they losing focus, dozing off, or getting overly agitated? You might want to make the decision to take a break earlier than you had planned if it is in the best interest of the meeting.
- At the end of the meeting:
  - Thank everyone for their participation
  - Summarize any final points and what the next steps will be
  - Let them know when you will have meeting minutes or notes available
  - Let them know when you will deliver

This chapter has looked at the general way that a meeting should operate to provide you with the most effectiveness. In the next chapters we will look at how to communicate with others during the meeting as well as ways to deal with conflict that might arise.

7 Basic Communication Skills for Meetings

7.1 Introduction

When you are in a meeting, you need to be able to communicate well with others in order to come to get your ideas across, understand the ideas of others, and come to decisions as a group. In this chapter we will look at some basic communication skills that will be helpful to you in meetings – as well as any other interactions you have with other people.

What does it take to communicate with another person? How are we communicating even when we aren't using words? When you begin studying communication, you'll find that we communicate with much more than our words. In face-to-face communication, our words are only part of the message.

The balance of the message, and in fact, the largest part of the message that we are sending to others is made up of non-verbal information. It is composed of our body language and our tone of voice. Figure 2 below demonstrates this fact.

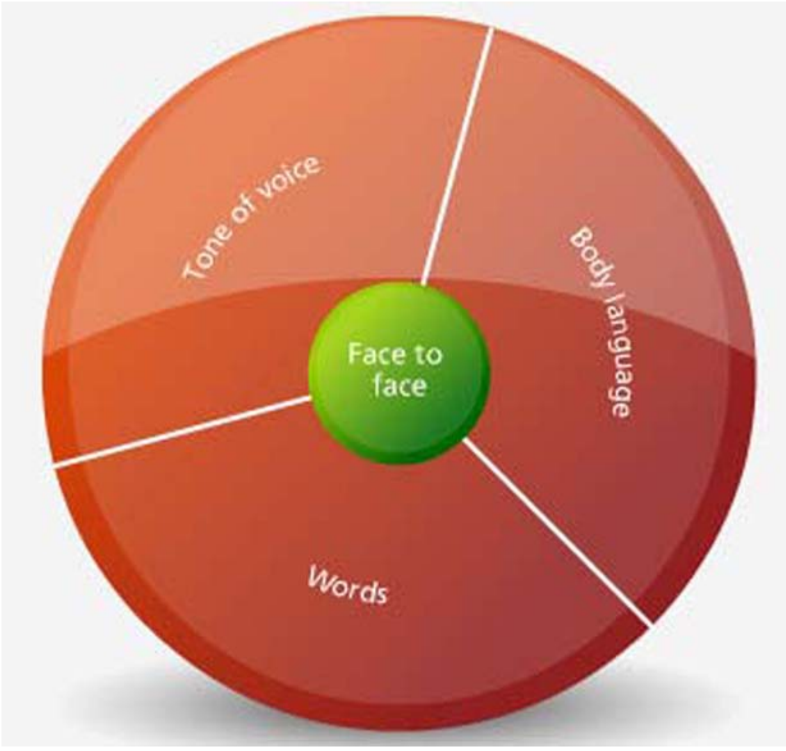

Figure 2: Face to Face Communication

7.2 Verbal vs. Non-verbal Communication

Remember that communication skills involve both verbal and non-verbal communication. Albert Mehrabian's work on verbal and non-verbal communication in the 1960s and early 1970s is still considered a valid model today. He posed that the non-verbal aspects of communication such as tone of voice and non-verbal gestures communicate a great deal more than the words that are spoken. He also found that people are more likely to believe your non-verbal communication than your verbal communication if the two are contradictory. In other words, you are most believable and most effectively communicating when all three elements of face-to-face communication are aligned with each other.

> We instinctively recognize what body language and other non-verbal forms of communication are telling us.

7.2.1 Tone of Voice

According to Mehrabian, the tone of voice we use is responsible for about 35–40 percent of the message we are sending. Tone involves the volume you use, the level and type of emotion that you communicate and the emphasis that you place on the words that you choose. To see how this works, try saying the sentences in Figure 3 with the emphasis each time on the word in bold.

> The same sentence can have multiple meaning depending on which word is emphasized. The emphasis on a particular word implies additional information than what the words say.

I didn't say he borrowed my book.

I **didn't** say he borrowed my book.

I didn't **say** he borrowed my book.

I didn't say **he** borrowed my book.

I didn't say he **borrowed** my book.

I didn't say he borrowed **my** book.

I didn't say he borrowed my **book**.

Figure 3 – Impact of Tone of Voice

Notice that the meaning of the sentence changes each time, even though the words are the same. The emphasis you place on the word draws the listener's attention, indicating that the word is important somehow. In this case, the emphasis indicates that the word is an error. So in the first example, **I** didn't say he borrowed my book, the phrase includes the message that someone else said it. The implied information continues to change in each sentence, despite the words remaining the same each time.

7.2.2 Body Language

Over half of the message we are sending can be due to body language. Body language is a subconscious way that we communicate, but it is one that we recognize in others on instinct. Examples of body language include:

- Facial expressions
- The way they are standing or sitting
- Any swaying or other movement
- Gestures with their arms or hands
- Eye contact (or lack thereof)
- Breathing rate
- Swallowing or coughing
- Blushing
- Fidgeting

Basically, body language includes anything they are doing with their body besides speaking. We recognize this communication instinctively, without having to be told what it means. It is important that when you speak to the other person, your body language supports rather than contrasts what you are saying. This is particularly true when you need to build trust with the other person because any contrast between your words and your body language could be construed as deception.

7.3 Listening Skills

Being effective in a meeting requires that you can listen to and understand what the other person is telling you. It sounds simple enough, but the truth is that good listeners are rare these days. Studies have shown that most listeners retain less than 50% of what they hear. Imagine what that means when it comes to a conversation that you might have with your boss, a colleague, or a customer. If you speak for ten minutes, chances are that you have only heard about half of that conversation – and so have they. No wonder miscommunications happen so frequently!

> Studies have shown that most listeners retain less than 50% of what they hear.

In order to be a good listener, you should practice active listening skills. There are five key aspects of becoming an active listener. You are probably already employing some of them, but may need to practice others. However, once you are using these tools over time, you will find that they get easier and easier. Plus, you'll learn so much about your customers, colleagues, and co-workers, and you'll have such better conversations with them, that you will be positively reinforced each time you practice.

1. **Pay close attention.**

   With this step, you learn to give the speaker your undivided attention. But you also let the speaker know that you are listening by using acknowledgements – types of verbal and non-verbal tools that help add proof that you are truly listening.

- Look the speaker in the eyes
- Stop any mental chatter
- Don't start preparing your response or rebuttal while the other person is talking
- Make sure your environment doesn't distract you
- Notice the speaker's body language and tone of voice – what are the non-verbal messages telling you?
- If you are in a group, avoid side conversations
- Take notes but don't doodle or pass notes to other people

2. **Demonstrate physically that you are listening.**

Use non-verbal and verbal signals that you are listening to the speaker attentively.

- Nod from time to time, when appropriate
- Use appropriate facial expressions
- Monitor your own body language. Be sure you remain open and relaxed rather than closed and tense.
- Use small comments like 'uh-huh', 'yes', 'right'.
- Ask questions when appropriate

3. **Check for understanding.**

   It is possible for the other person's message to get mistranslated or misinterpreted, so that we hear a message that was not intended. Before responding, it's important to check for understanding using these tools.

- Use reflecting and paraphrasing. Check that you heard the message correctly by saying things like "what I hear you saying is…" or "If I'm hearing you correctly, you're saying…" or "I think you're talking about…".
- Ask questions that will help clarify the speaker's meaning. Suggestions include things like, "Can you tell me more about…?" or "What did you mean when you said…?" or "I think you're saying… is that right?"
- Summarize what you've heard occasionally – don't wait until the end or you might not remember exactly what was said.

4. **Don't interrupt!**

   There is nothing good that comes from interrupting the speaker. You will only be limiting your chance of understanding the message because you won't hear it all – and because the speaker will get frustrated!

   Determine whether or not questions will be asked during the presentation or if it would be better for everyone to hold their questions until the end of the presentation.

5. **Respond Appropriately.**

   When you are actively listening, you are showing your respect for the speaker, as well as gaining the information that you need to form your response. Once you have that information and have clarified it, it's time to form your reply. When expressing your thoughts:

- Be honest and open
- Be respectful
- Be thorough

7.4 Interpersonal Skills

Interpersonal skills are more than just communication skills. They are the 'people skills' that seem to come to some of us so naturally, while other of us may struggle with them. Interpersonal skills will help you to work with others and build rapport with them, but they will also help you to respond to hold meetings in a productive manner.

Some interpersonal skills include:

4. Courtesy – it's been said that good manners cost nothing, and that's the truth. There is no reason to be anything but courteous when meeting with others. It fosters relationships and shows that you care about making the other person comfortable.
5. Respect for others – you've heard the 'golden rule', that you should treat others the way that you would like to be treated. But the true expression of respect is something called the 'platinum rule' – treating others the way that they would like for you to treat them.
6. Ability to see things from others' perspectives – if you a person in the meeting who is upset about something, you might feel as if they have overreacted at first. But you need to be able to understand how what has happened is affecting that person.

7. Imagine you're meeting with a customer who is upset about a recent shipment that was a day late. Perhaps to you, having the order arrive one day late is not a big deal. But to your customer, it could mean lost sales, lost productivity, embarrassment for him in dealing with his own customers, or any number of things. Your job is to understand – and express that understanding – so that the customer feels heard and acknowledged.
8. Ability to understand various communication styles – each of us has a way of communicating with the world, and that of the person you are dealing with could be very different from your own. These differences could create barriers to relationship building if you don't understand how they may show up.
9. For example, a person who you perceive as being rude or cold may simply be reserved or shy. Or a person you see as intrusive or forward may simply be interested in people in general and does not mean any disrespect. This is just one form of keeping an open mind when working with others – a huge factor in interpersonal skills!

8 Working Effectively in a Meeting

8.1 Introduction

In the last chapter, we looked at some general communication skills that are needed to express your ideas and understand the ideas of others, as well as some skills that would help you communicate more effectively in general. The skills discussed in this chapter are more focused communication skills that will help you to solve problems or resolve conflicts in a meeting. Conflicts and problem solving can stall a meeting's progress, so knowing how to move past them is essential if you want to run an effective meeting.

8.2 Problem Solving Skills

Many meetings are held to come to a consensus on how to solve a problem. The tricky part of this situation is ensuring that the problem that you are attempting to solve is the actual problem that exists.

For example, a co-worker might come to you saying that they need you train their employees on how to use their software correctly. You could just write the training and deliver it and move on. Or instead, you could meet with the co-worker and others in positions of authority and ask questions in order to determine what the problem is that they are trying to solve with the training. You may then be able to:

- Offer a training that focuses on the exact problems the employees are having
- Discover that the software isn't the only part of the problem and so offer a training that addresses the full problem
- Discover that the software wasn't the problem at all but that it was the order fulfillment process that was the true problem – so now you can offer a training that addresses the real problem
- Determine that training isn't the solution to the problem, but that another action such as updating the software or updating other procedures is the real solution.

One simple problem-solving tool is to use something called 'The Five Whys.' It is simple because it uses the question 'why' up to five times in order to help get to the root of a problem. But remember that it is indeed a simple tool – if you are dealing with a more complex problem, you may need to learn other problem-solving skills. An example of how to use this tool is shown in Figure 4 below. Notice that in this case, it's not necessary to use five 'why' questions to get to the root of the problem.

Customer	Salesperson
I need a copy of your ABC billing software.	Might I ask why?
We are having problems keeping track of customer bills.	Why are you having trouble?
We do it by hand, but now our customer base has grown so much that we can't keep up. Correspondence in general is difficult.	Why is correspondence difficult?
Because we have about 10 different pieces of information that have to go out to different customers in addition to the bills. Keeping all that in order is quite a challenge.	It sounds to me like you need more than a billing system – it sounds like a customer contact management system is what you really need. Why don't I show you some of the benefits it could provide?

Figure 4: Using the Five Whys Tool

8.3 Persuasion Skills

You may find that in some meetings, you need to persuade others. You may need to persuade them to accept a decision, to make a decision, to move on to the next point on the agenda, or any number of other things. The most important skill in persuasion is the ability to understand the point of view of the other person and then provide information on your position that will matter to that person. The facts might be important, but the benefits of those facts, or the impact of those facts, are what will persuade the other person to your side.

As an example, let's look at persuasion skills that are important for selling. In fact, all persuasion is a form of selling – whether it's selling a product or an idea. Let's imagine that you sell alarm clocks – a simple example, certainly, but it will help you to see the difference between features and benefits in Figure 5 below.

Features	Benefits
Dual Alarms	Lets you set a back-up to be sure that you don't oversleep, or lets you set different alarm times for different people.
Large, Illuminated LED Numbers	Makes it easy to see the time without turning on any lights. Easy to see even if you are sleeping without glasses or contacts.
AM/FM Radio	Allows you to enjoy music at any time, or to set your alarm to activate on the music station of your choice.
MP3 Player Jack	Turns your alarm clock into speakers for your MP3 player for use at any time of day. You can also program the clock so that you wake up to your favorite songs on your MP3 player.
Durable Plastic Casing	This clock can withstand those early morning slaps to turn the clock off.
One Year Manufacturer's Warranty	Protects your investment. With any malfunction of the clock, you can get a replacement in the first year.

Figure 5: Comparison of Features and Benefits

Now imagine that you are meeting with your boss and trying to persuade her to allow adjusted time schedules (flexible scheduling) and working from home one day per week. What would the features and benefits be? See Figure 6 for an example.

Features	Benefits
Employees can work from home one day per week.	Better employee satisfaction and retention. Improved work output on one day of telecommuting. Fewer traffic-related tardies and fewer traffic-related absences due to accidents. Reduced overall employee stress levels.
Employees can work flexible schedules, working their eight hours anytime between 7am and 7pm as long as it is scheduled ahead of time.	Better employee satisfaction and retention. Less tardiness and fewer absences related to childcare issues. Improved customer service because someone will usually be available across all twelve hours to respond to customer.

Figure 6: Features and Benefits of Flexible Time Schedules and Telecommuting

Here are some more tips on how to persuade others:

1. **Demonstrate Your Understanding**

   Putting yourself in the other person's shoes lets you look at the scenarios they are facing and helps you to concentrate on finding the best solution for their situation. When you work with the other person, try to realize that a problem or concern is not about you – it's about them and their expectations. Ask questions that demonstrate you want to learn about their needs and how you can help resolve the problem – as well as how to prevent it from happening again in the future.

2. **Generate a Friendly, Responsive Environment**

   Don't underestimate the impact of being friendly and responsive. Your attitude in meeting with the other person, identifying their needs, and handling their requests says a great deal about you and your willingness to resolve issues quickly and in the best way possible. Plus, for customers, your responsiveness – how quickly you respond and how well you meet their expectations – will be an important decision point for any customer. One good rule of thumb is to under-promise and over-deliver for your customers – remembering that you have both internal customers and external customers. You'll be demonstrating an exceptional level of service that they will want to experience again in the future.

3. **Provide Evidence and More Evidence**

   You need to be able to demonstrate the other person that your idea, solution, or resolution will benefit the customer, situation, or organization in ways that the other solutions cannot. Give the other person as much evidence as you can – testimonials, data, commitment from others, or any other information that helps to solidify your position. And then remember to make sure you are providing information that is of value to the person you are trying to persuade! No matter what you do, be sure that anything you share is fully verifiable.

4. **Demonstrate Your Expertise**

   Who would you be more apt to be persuaded by – someone who knows the basics about your situation or someone who you believe truly understands what you are facing? As you work with the other person, demonstrate that you understand what you are presenting to them. Share information that shows you understand their situation, including any upcoming trends, or challenges. You'll instill confidence in the other person, making it easier for them to choose your idea or solution.

8.4 Brainstorming

Of all the tools that you will use in meetings, brainstorming is the least complicated and the easiest to use anytime, anywhere. When people are engaged in a brainstorming discussion, the ideas should be flowing out and everyone should be participating. To help your brainstorming sessions be as productive as possible, consider the following guidelines

10. Forbid negative comments or criticism. If someone is afraid that their ideas will be mocked or ignored, they will not want to participate. Consider directing the participants to brainstorm individually and then in pairs before coming back to the group if you have a large group or a group that is not acquainted with each other.
11. Go for a high quantity of ideas, not necessarily the best ideas. You want to start broadly and then narrow them down after the brainstorming is completed. People think differently and express themselves differently, so allow as many ideas to come out as you can before beginning to narrow down the field.
12. Encourage people to think outside the box – way outside of it. Don't censor anyone or judge their ideas. Again, let the creative thinking process work. Even if something sounds crazy, capture it – you never know when that crazy idea might lead you to a realistic solution.
13. Look for ways to combine new ideas with existing ideas. Often, the easiest way for people to think creatively is to start with something they are already doing and enhance, expand, or otherwise alter it. Allow people to build off of each other's ideas and help inspire one another.
14. Consider appointing a facilitator who can guide the group back to the topic at hand and keep the brainstorming going. However, be sure that the facilitator is also able to participate in the discussion.

8.5 Fishbone Diagrams

Fishbone diagrams are visual representations of the information that you gather during a brainstorming, problem-solving, or troubleshooting discussion or exercise. It is a way to organize your thoughts into like groups and establish relationships between those thoughts. While fishbone diagrams are excellent for exploring issues or finding the causes of a problem, they are not useful for identifying timelines or costs associated with the solution. The fishbone diagram gets its name from the fact that the way it is drawn often resembles the skeleton of a fish. It was designed by a Japanese industrial quality management professor named Kaoru Ishikawa, so they are sometimes referred to as Ishikawa diagrams as well.

A fishbone diagram usually has two 'sections' to the drawing. On the left hand side (and the majority) of the diagram, you list the suspected causes of a situation, problem, or issue. On the right hand side, you have the 'head' of the fish, which is the effect, the situation, or the issue itself. Each 'rib' of the fish leads into the 'spine' of the fish and indicates a factor that you believe is contributing to the overall problem or situation. These diagrams are usually hand-drawn during a brainstorming discussion, but an example of a fishbone diagram is shown in Figure 7 below.

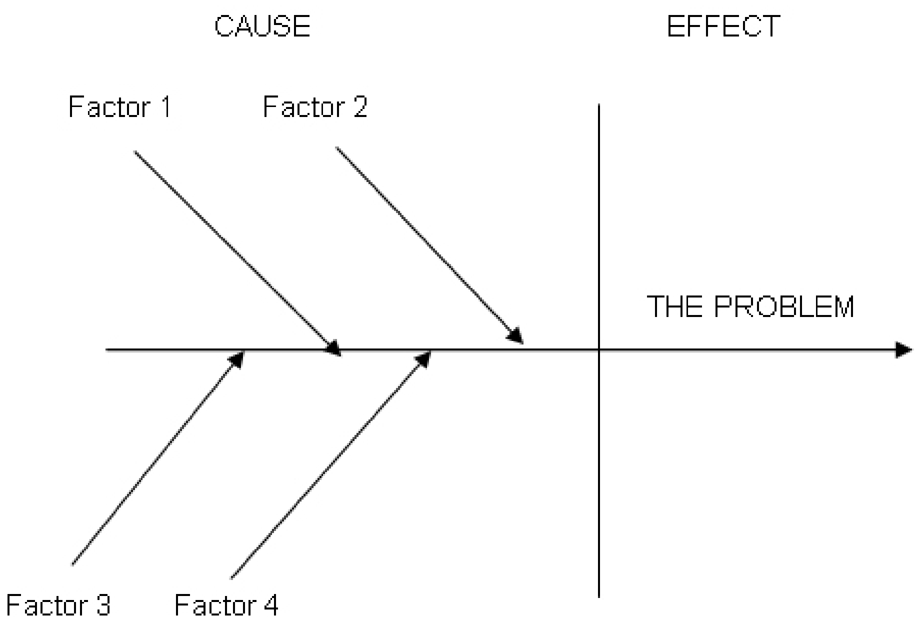

Figure 7: Example of a Fishbone Diagram

Each of the 'ribs' of the fish may have sub-issues, which could also then have sub-issues. You can continue to 'branch' each rib down to several levels of issues if you need to. The end result is that you have a kind of 'map' of the situation, with all of the factors that are causing the problem or situation that you can think of. You can now prioritize each factor depending on how much influence you believe it has on the result. As you investigate and eliminate factors from consideration, you will identify the main source of a problem or issue.

Common factors that are placed on a fishbone diagram are:

- People
- Process
- Materials
- Equipment
- Systems
- Environment
- Management
- Training
- Legal

Of course, some of these might actually be sub-factors of each other. For example, under people, you could have management or training. It simply depends on the situation you are examining and the factors that are affecting it.

8.6 Managing Conflict in a Meeting

Conflicts will happen from time to time. It will be helpful to you in managing conflict in a meeting if you have a bit of information about the conflict styles that people might use. Then we'll look at a specific way to help resolve conflicts when you're in the middle of one.

8.6.1 Preferred Conflict Styles

The theory that people have one of five preferred conflict styles was posited by Kenneth Thomas and Ralph Kilmann in the 1970s. Similar to the way that communication styles can help you to identify how another person is communicating their concerns to you, these five styles will help you to understand why the other person might be acting the way they are during a conflict. You can also choose a given conflict style to apply during meeting discussions, depending on the situation that you are dealing with. They are:

Competitive: These people like to win. They like to be in a position of power and will definitely take notice of who has the most authority in a conflict situation. They may decide to dig in on a position, even if they don't yet have all the facts. This is a useful style when you have to get into action and make a decision (when you don't have time for a lot of discussion), when you know the decision you want to put in place is going to be unpopular, or when you have someone else you are dealing with who is being aggressive or trying to exploit a situation. Be warned, however, that this style often results in hurt feelings and dissatisfaction in others, so it should be reserved for emergency or occasional situations.

> **Collaborative:** This is the opposite style of competitive. In this style, you try to accommodate everyone's point of view. You might be assertive, but you want everyone's input because you believe it is important. When you have existing conflict in a group that has not been resolved, when the decision needs buy-in from everyone, or when the situation is very important, you can use this style.
>
> **Compromising:** In this style, you go into the discussion expecting that every person involved will need to make compromises of some sort, including you. The attempt is made to find some aspects of the solution that will satisfy everyone in the party. This is a useful style when it is more important to have agreement and consensus on an issue than to hold on to your point of view. Or, you can use it when you have two equally strong opponents who seem to be deadlocked at this point of their discussion. This can be a time-intensive strategy as well, so it might not be the best choice if you have a tight deadline.

Accommodating: In this situation, you don't give a lot of opposition to the other party. You are willing to make concessions in order to make the other person happy or give them what they want. You are cooperative rather than assertive. In general, you use this style when the relationship with the other person is more important than getting a specific outcome, or when you really don't have a great deal of stake in the discussion or the results.

Avoiding: When you use this style, you actually seek to avoid the conflict entirely. You might try to delegate it to another party or to avoid making a decision that you know might be unpopular. If it is appropriate to pass the conflict on to another party who has more information or is more invested in the outcome, then by all means, do so. However, this is more often than not going to be a bad choice in strategy. There are few situations in which avoiding conflict will actually be beneficial.

8.6.2 The Interest-Based Relational Approach

The interest-based relational approach, called IBR for short, lets you respect the differences among individuals involved in the conflict but also helps to keep them from becoming too attached to a specific position. To use this strategy, you follow a simple set of rules when you go over ground rules of the meeting. They are:

- Agree that maintaining working relationships will be the first priority.
- Keep the problems you are facing separate from the people you are dealing with (in other words, don't let the discussions get personal).
- Listen for why the other person is taking the position they are taking. What benefits are they looking for? What is important to them?
- Listen, listen, listen. Allow the other person to fully explain their point of view before responding or stating your own.
- Find points of mutual agreement. These are usually facts or objective elements that you can agree upon. For example, you might have a set budget, a set date, and an agreed-upon theme for your event. Start building from what you can agree upon first.
- Agree to explore multiple options together. Conflict resolution is rarely achieved by entrenching yourself in a position and refusing to budge. Agree to keep an open mind while you explore several possible solutions.

9 After the Meeting

9.1 Introduction

Just because the meeting was adjourned, that doesn't mean that your attempts to have the meeting be as effective as possible are over. There are several steps you should take after every meeting to make certain that the time you invested was not wasted.

9.2 Get Feedback

All of us can improve on our meeting skills. If you look at every meeting you organize as a learning opportunity, then you will quickly figure out what you need to do to improve your skills by asking yourself what went well and what could have gone better – but by asking the others in the meeting for feedback as well. You can get this feedback in one of several ways:

- Formally or informally
- At the very end of the meeting or at a time shortly after the meeting
- On a written evaluation
- By phoning or speaking to each participant individually
- By email

The type of questions that you ask the other participants will vary depending on the type of meeting you had, but some of the questions you should be asking yourself and others for any type of meeting include:

- How well did we meet the meeting objectives?
- Did we stay on the agenda?
- Did we start and end on time?
- Was everyone given the opportunity to participate?
- What could have been done differently / changed / improved to make the meeting more effective?

9.3 Prepare and Send Meeting Summary

In an ideal world, you could assume that everyone in the meeting was paying attention, taking notes, and understood what they needed to do once they left the meeting. However, we don't live in a perfect world. It's more likely that at least one person was on their smart phone the whole time, another one zoned out for part of the conversation, and another one just plain didn't care about what was going on. So it's up to you as the meeting coordinator to make sure that the important information shared during the meeting – including what tasks were assigned to each person – is captured and sent out to the group.

You may have a standard meeting minutes format, or you may need to create one. In either case, use your meeting agenda as a guide and be sure that you capture the following on your document:

- Date, time, and location of meeting
- Names of attendees
- Decisions made or votes taken
- Items that arose that were slated for later discussion
- All task assignments or 'to-do's' including who is responsible for each item and when it is due
- If known, the date, time, and location of the next meeting

You may also want to capture any information that led to the specific decision or assignment. For example, perhaps during the meeting you discovered that Joe Smith will be on vacation for the next two weeks. Therefore, all the IT tasks that would normally be assigned to Joe will be given to Sue.

Why is it important to be thorough with a meeting summary? Because you don't know exactly who else might be reading it. For example, participants might send the meeting summary on to their supervisors or to other team members who need to know some of the information. If you don't provide enough context in the meeting summary, you may have people end up poorly informed. Another reason to be thorough is because you can use your meeting summaries as a record of what decisions were made and why. If anyone ever questions why you made a certain decision, you can go back to your meeting summary to find the answer. Finally, one last reason to be thorough is so that anyone who missed the meeting can be caught up by reading the summary. That way you won't have to worry that someone is acting without full information.

Timing is important when you send out the meeting summary. You want to try to get it done within a couple days. Don't wait weeks and weeks to send out the summary, because people will forget certain details. Plus, if they had tasks to complete, you want to remind them of that so that they can put time on their schedules to complete the tasks.

9.4 Follow Up on Tasks

If you are the meeting coordinator because you are also the project manager or the person responsible for the topic at hand, then you will want to establish a way to follow-up on tasks that were assigned to others. It may be helpful for you to create a spreadsheet that allows you to sort tasks by the person assigned, by the date it is to be completed, or by the topic area that it is concerning. That way you can follow up on assignments by date, by person, or by subject.

Be sure that you inform others during the meeting that you will be following up on the assigned tasks. That way they will know that you will actually hold them accountable for what they were assigned. One last thing you can do to help follow-up is to use the next meeting's agenda as a reminder. For example, if Sue Jones was to complete three tasks related to the IT system by the next meeting, you can put as an item 'IT system – update from Sue Jones.' That way you are providing one last reminder to the person that you expect to hear about their progress at the next meeting.

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