

Productive Group Meetings

NEELEY DEVELOPMENT SERIES—TOOLS FOR BUSINESS



Make the most of your meetings

TCU

Neeley School
of Business

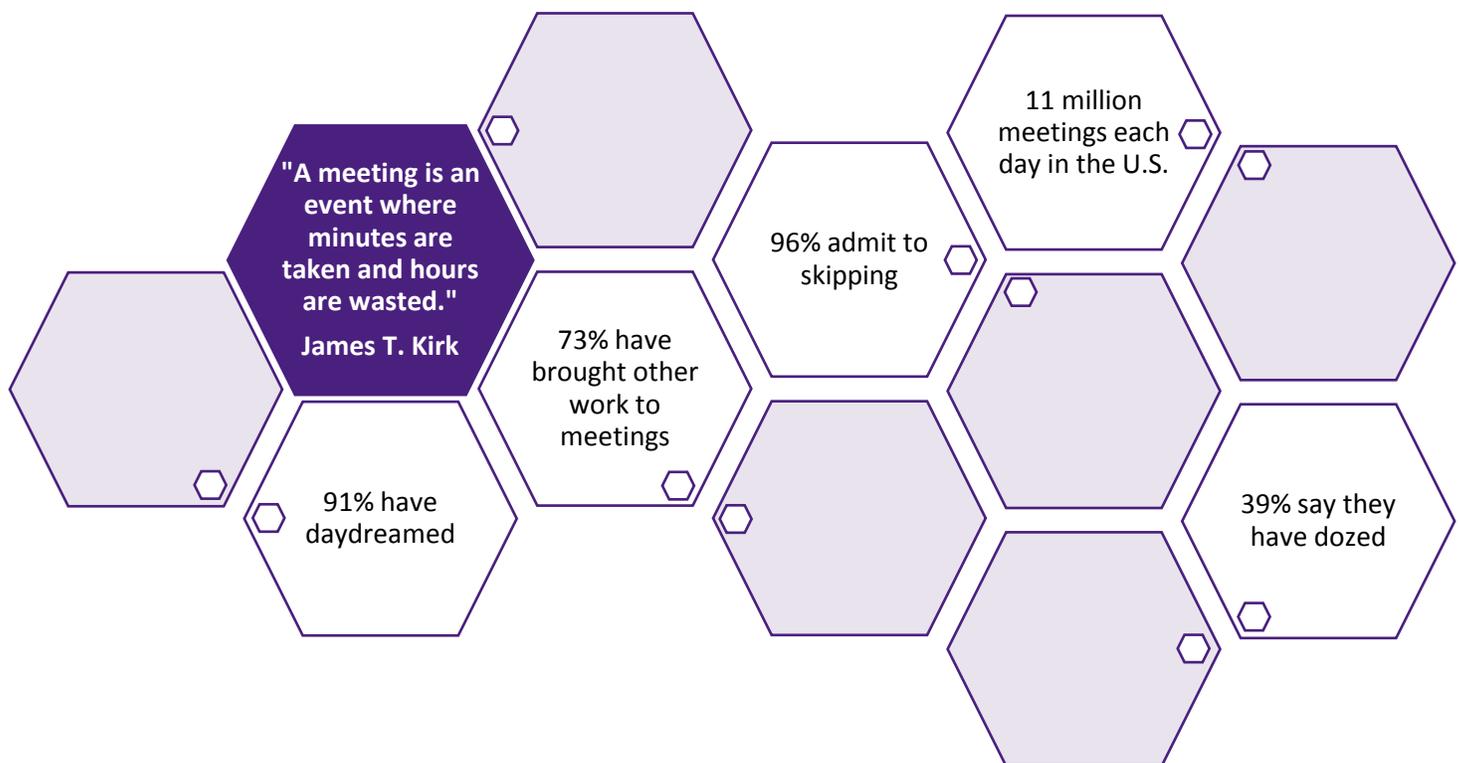
Session Goals

At the end of this session, you will be able to:

- Detail the costs of unproductive meetings
- Describe the steps of the meeting planning process
- Identify the two most common problems with meetings
- Design an effective agenda
- Identify resources for further development in meetings management

Additional Goals:

- _____
- _____
- _____



Should I Have a Meeting?

Identify the necessity of a meeting.

- Do you have a clear *desired outcome*?
- Can you clearly state the purpose of the meeting in *specific* and *measurable* terms?
- Have you thought about what needs to happen for this meeting to be a *success*?
- Do you have enough *information* to achieve the desired outcome?
- Is a meeting the best way to accomplish your *objective*? Would a phone call or written communication accomplish the task as well or better than a meeting would?
- Is there anger or hostility in the group so that people need *time* to calm down before they begin to work together?

Six Steps

Identify the necessity of a meeting.

1. **Recognize Desired Outcomes:** Identify what you want to come from the meeting.
2. **Consider Your Environment:** Scan the environment to determine what is going on that may have an impact on the meeting, as well as how this meeting may affect other events.
3. **Evaluate the Key Players:** Include those responsible for the decision or process, those likely to be affected by the outcome, or in a position to put a barrier in place to stop the outcome.
4. **Establish Roles:** Identify who will participate, who will facilitate, and who will record. Each person has a specific role and responsibility, and each effects the success of the meeting.
5. **Plan an Agenda:** Write an agenda which will detail a flow of topics, with suggested processes and allocated time amounts.
6. **Incorporate Logistics:** Manage the room's physical environment.

Planning Your Meeting

Meetings are costly. Therefore, they must be productive, efficient, and fun. For every meeting you organize, consider the following:

- A. Do we really need to meet? Can an email, text, or group message serve the purpose?
- B. Who really needs to attend? Do we really need the whole team, or is it more appropriate to invite just the people who will be involved in the topic?

If you plan to go ahead with a meeting, use the following guidelines. Your team members will thank you!

1. Always, always, always start on time, regardless of who is or is not present. Starting late teaches people that it is okay to keep other waiting, and it is okay to waste others' time.
2. End on time, too! People have made other commitments and will become resentful if they are asked to stay past the original stop time.
3. Develop a code of conduct to adhere to at each meeting. To develop a personalized code of conduct, ask the team the following questions:

Question	Answer (Example)
When will the team meet?	The team will meet every Friday at 9:00 a.m.
How many people are needed to meet? To make decisions?	We need 3 people to meet and 4 people to make decisions.
What will we do when we know we will be absent from a meeting?	We will let the facilitator know as soon as possible that we will be absent. Ideally, we will let the facilitator know by noon on Thursday. If we know that we will be absent, we will read the minutes and ask questions during the week to find out what went on so we don't need to spend meeting time to catch people up-to-date. In addition, if we want to vote on an issue, we will designate a proxy.
How will we conduct ourselves during the meetings?	We won't hold back our ideas. We will be respectful and professional. We will try to get even participation. We will have one conversation at a time. We will honor the confidentiality of what goes on at our meetings.
Who can call a meeting?	Any member can call a special meeting.
How will we make decisions?	We will make decisions by majority vote unless otherwise specified. We will support all team decisions, even if we were absent during the vote or if we voted against it.

Planning Your Meeting, continued

4. Decide who will fill each role, and rotate the roles.
5. If the group will meet regularly, conduct the first several meetings efficiently to model the desired behavior. Then, start rotating facilitation (and other) duties. This will build skills and increase empowerment and accountability.
6. In the original invitation/meeting planner, establish the exact location of the meeting room. (For example, the building and room number on campus, or the address and room for meeting locations off campus.)
7. Minutes should contain the results of all decisions, the names of all who received action items, and anything else that might need to be referenced at a later date. They should be kept in an easy-to-find file (perhaps a Google Drive folder or a shared Dropbox folder).
8. Minutes should be distributed within 8 business hours of the meeting.
9. List tasks to be done before, during, and after meetings.

Meeting Sequence	Functions (Examples)
Before the Meeting	<ul style="list-style-type: none"> • Assign meeting roles • Find meeting room • Determine participants • Prepare/send meeting planner • Prepare/send agenda • Post agenda in meeting room • Prepare handouts • Plan an icebreaker activity • Prepare snacks
During the Meeting	<ul style="list-style-type: none"> • Conduct icebreaker activity • Bring snacks • Go through agenda items • Assign action items • Take minutes • Evaluate the meeting
After the Meeting	<ul style="list-style-type: none"> • Prepare/distribute minutes • Track and complete action items

Everyone Has a Job

Determine roles for each member of your team that they will fulfill during the meeting. Rotate these roles in order to promote learning skills throughout the semester.

Role	Responsibilities
Facilitator	<ul style="list-style-type: none"> • Summarizes key points and keeps the group focused on the target • Encourages different viewpoints and opinions to make sure all bases are covered and all ideas are brought forth • Minimizes interruptions, side conversations, and disruptive behavior • Reinforces the meeting ground rules • Maintains a positive and constructive meeting environment • Evaluates and gets input on how to improve future meetings • Monitors group energy; decides when to take breaks or forward items to another meeting
Recorder / Scribe	<ul style="list-style-type: none"> • Records key points and issues, decisions made, action items, and highlights of the meeting, not what was said word-for-word • Does not censor, judge, or interpret what was said • Recaps notes with meeting participants to ensure clarity and accuracy • Finishes and circulates minutes as soon after the meeting as possible
Timekeeper	<ul style="list-style-type: none"> • Keeps track of the time allocated for each agenda item • Announces the time remaining and when time is up
Gatekeeper	<ul style="list-style-type: none"> • Monitors group behavior according to designated behaviors • Reports and summarizes group behavior for the team • Generates actions the team wants to take based on gatekeeper feedback
Participant	<ul style="list-style-type: none"> • Respects the agenda timeframe and the roles of the participants • Monitors own behavior • Follows meeting ground rules; takes responsibility for ensuring that peers do the same
Devil's Advocate	<ul style="list-style-type: none"> • Constructively argues for the other side of agreed upon action in order to ensure the team has thought of all possible outcomes and is confident with their ultimate decision
Food Provider	<ul style="list-style-type: none"> • Provides snacks/food items for all participants during the meeting, taking food allergies and preferences into consideration
Icebreaker	<ul style="list-style-type: none"> • Responsible for running an icebreaker activity at the start of the meeting that includes ALL participants
Action Items Keeper	<ul style="list-style-type: none"> • Maintains the list of action items and responsible parties for each meeting • Tracks action items to completion

Meeting Minutes Template

Take brief, accurate notes of what is discussed and the decisions made; capture new action items. This role should rotate between team members.

Meeting Called By							
Type of Meeting							
Meeting Facilitator							
Timekeeper							
List of Attendees							
Topic: _____ Presenter: _____							
Summary of Discussion							
Conclusions							
Action Items	<table border="1"> <thead> <tr> <th>Person Responsible</th> <th>Deadline</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> </tr> <tr> <td></td> <td></td> </tr> </tbody> </table>	Person Responsible	Deadline				
Person Responsible	Deadline						

Helpful Tips:

- Don't record every comment; instead, focus on the gist of the discussion
- Record key decisions and actions that came out of the meeting
- Assign a date for when each action item will be completed
- It's okay if you lag behind the discussion a bit—just ask your group to slow down so you can catch up
- Read the action items out loud at the end of the meeting—it reminds everyone who took an action and allows for corrections
- Develop a system of abbreviations that you use while taking notes in the meeting; however, don't use the abbreviations when you type the notes
- Add a message when you send the minutes to ask for corrections or additions
- Include any copies of documents distributed during the meeting
- Proofread the minutes before you send
- Don't be intimidated! Taking minutes requires practice and you will develop a deeper understanding of the issues your team is working on/through

Agenda Template

MEETING: _____ Meeting Title _____

DESIRED OUTCOMES: _____ What you want to come out of the meeting _____

DATE: _____

LOCATION: _____

FREQUENCY: _____

TIME: _____

TOTAL HOURS: _____

INVITE LIST:

MEETING ROLES:

Role	Team Member

HANDOUTS: _____

Topic	How	Who	Time

How can we improve our meeting for next time? _____

EVALUATE	YES	NO
Stayed on track		
Everyone participated		
Achieved meeting purpose		
Clarified next steps		
Meeting time was well spent		

NEXT MEETING
Purpose:
Facilitator:
Date/Time:
Scribe:
Timekeeper:

Design an Agenda

WHAT: Create an agenda

WHEN: Now

HOW:

- ✓ Get into a team
- ✓ Choose an upcoming meeting that one of your team members needs to plan
- ✓ Present your agenda to the group for feedback
- ✓ There are no limits: be creative, yet effective

REMEMBER: the Six Steps

Meeting Roles	Plan the Agenda	Plan Logistics & Room
<ul style="list-style-type: none">• Who needs to participate?• Recognize limitation of some to perform tasks	<ul style="list-style-type: none">• Have it available before the meeting• Minimize topics• Be flexible	<ul style="list-style-type: none">• Neutral room in planning a potentially heated meeting• Book an adequate amount of time
Purpose	Environment	Analyze Key Players
<ul style="list-style-type: none">• What needs to be accomplished at the end?• State the purpose in specific and measurable terms?	<ul style="list-style-type: none">• What's the big picture?• How do the goals of this meeting align with the goals of the team?	<ul style="list-style-type: none">• What does success look like for others?• Invite those that can block or assist decisions

Two Main Problems

1. Lack of Planning

- The main cause for unsuccessful meeting is that no one takes the time to plan for their success
- Planning puts a structure in place that supports the success of the meeting, identifies potential barriers, and puts steps in place to prevent them

2. Lack of Process

- A good facilitator will focus on both content (what) and process (how). These are the two dimensions available any time people interact with each other
- The content of a meeting is what is being discussed: the decisions being made, the problems being solved, the subjects being dealt with. Because it is fairly obvious, the content portion of the meeting generally consumes the attention of the members.

Level 5 Time Management

Building habits of execution through recurring tasks

5 Levels of Time Management

1. Manage your minutes
2. Manage your hours
3. Manage your day
4. Manage your week
5. Manage your month

Level 1: Make a list

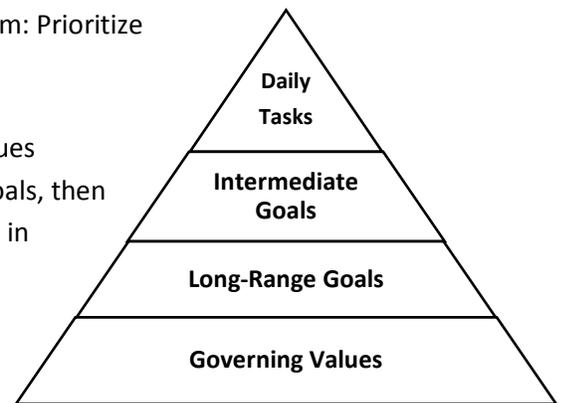
- Capture your thoughts in one place so you don't forget

Level 2: Rank your list

- Put your tasks in the order which you'd like to complete them: Prioritize

Level 3: Control the events of your life

- Use the Productivity Pyramid to manage your governing values
- Set long-range goals, break them down into intermediate goals, then break them down into bite-sized daily tasks which you write in your Day Planner
- Governing Values are what matter most in your life



Level 4: Mission, Vision, Roles, and Principles

- Dr. Stephen Covey's four-quadrant model
- Get the *right* things done at the expense of getting *lots* of things done

		Urgent	Not Urgent
Important	I	Crises Pressing problems Firefighting Major scrap and rework Deadline-driven projects	II Prevention <i>Production capability</i> activities Relationship building Recognizing new opportunities Planning Re-creation
	III	Interruptions Some calls Some mail Some reports Some meetings Proximate pressing matters Popular activities Some scrap and rework	IV Trivia Busywork Some mail Some phone calls Time-wasters Pleasant activities
Not Important			

Level 5: Recurring tasks that build habits

- Execution is getting the right things done well, day in and day out
- It is only our actions that bring results
 - Quadrant Two actions: important but not urgent, bring the most leverage, forever delayed by practicing procrastinators
 - It is what we spend our life *doing* that reveals who we really are
 - Habits shape our character!
 - How do you discipline yourself to do those key important things every day that you know you should do?
 - Daily recurring actions form habits

Name: _____		Reservoirs																
Priority		1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	13th	14th	15th	16th	17th
	Get Up on Time																	
	Daily Prayer and Meditation																	
	Read the Scriptures																	
	Write in Journal																	

A section of my early Reservoirs Chart – Ken Krogue



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About the Neeley Professional Development Center

The Professional Development Center (PDC) provides the strategy, support, and resources for student talent development. Succeeding in today's dynamic workplace requires an ability to effectively manage interpersonal and team relationships on a global scale. With an emphasis on self-awareness, the PDC equips students with the skills necessary to establish themselves as business professionals capable of communicating their thoughts, ideas, and opinions to influence others and achieve goals. M.J. Neeley established the center, originally called the Center for Productive Communication, in 1987. He owned many businesses and had the foresight to understand the critical role communication has in business.

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