

# A Useful Guide to Managing Meetings



Ian Clarke & Steve Westall

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# A Useful Guide to Managing Meetings

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Written by Ian Clarke & Steve Westall

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## Chapter 1 – Preparing Yourself

*“Time is the coin of your life. It is the only coin you have, and only you can determine how it will be spent. Be careful lest you let other people spend it for you.”*

Carl Sandburg – US Biographer and Poet (1878-1967)

This Useful Guide provides you with some ideas and tips which we hope will help you become more effective when you chair or attend meetings.

### Starter Tips

OK – let’s start off with a few tips that will ensure you hit the ground running ...

- It is important to book some personal time to give you the space to review and work with each chapter in this Guide – why not create or reserve some time in your diary now?
- Be prepared to try out some of the ideas along the way to establish the differences they are making to the use of your time and the effectiveness of the meetings you attend or chair.
- Take this opportunity to download a-useful-guide-to-managing-meetings-toolkit.doc (this is the toolkit in MS Word so you can use it on your computer. You can download the zip file by clicking [here](#).

### How much time will I need to work through the Guide?

Well, we reckon about five hours should be enough time to look at the materials. Your learning will take place as you go about your normal business and try the ideas covered in the chapters themselves..

1. We suggest you book some meetings with yourself now
2. Treat this time as personal investment. The return will be noticeable quite quickly.

### Discussion

In Business, we all know how difficult it is to cram everything into an already packed day. Personal development can sometimes end up as yet something else we have to fit into the day. We feel our approach has two distinct advantages ...

**Firstly** – you can decide the rate at which you progress through the Guide Chapters. You have the full Guide here so you can look at the scope and breadth of the material.

Experience tells us that the learning is much more effective if you personally try the ideas and tips in your own business environment so please CHALLENGE yourself to try and test the ideas as the opportunities allow. Like “To Do” lists, we feel that

taking on sensible targets and meeting them is far more motivating than trying to do everything before “close of play”.

So implementing one or two ideas per week is FAR more effective than trying to perform a 100% transformation in your behaviour (and, dare we say it), in other people’s as well in a few days.

**Secondly** – because we recognise you are already very busy, we have broken up the Guide material into “manageable bites” to give you a realistic chance to try the ideas and suggestions before moving on to the next Chapter

There are some important aspects to this Guide which underpin much of the learning.

### **Why is it important that you set aside time to review and try these ideas?**

Unless you create personal time and space, the normal “Business as Usual” pressure will always prevent you from making this key personal investment.

### **Will these ideas work for me?**

We put forward the tips and ideas because we found they have worked for us in our Business careers. Of course we have sometimes captured some pearls of business wisdom from text books– and yes, we have been on management development courses too!

However, these are practical tips that perhaps may be obvious but, in our experience, are certainly not executed consistently enough. It has always been our aspiration to share our learning so that others can use it in a fast track way – we would be delighted if you could move up the learning curve at least twice as fast as we did!

### **Meetings Cost Calculator**

And if you need more evidence that attending meetings (especially poorly run ones or those over-attended) just try out our Meeting Cost calculator here ...

<http://www.pansophix.com/resources/managing-meetings-cost-calculator.xls>

You just need to input some data relevant to your organisation and the calculator will show you the cost of your meeting.

We offer you 6 challenges in this Guide to help reinforce the tips and ideas which you can do as you go about your normal day to day business.

## Challenge 1

Here's your first challenge! We're going to ask you to look very carefully at the meetings you attend over the next week and give each meeting a score.

Use a scale of 1 to 10 where ...

1 = the meeting was a complete waste of time and badly chaired

10 = the meeting was extremely valuable and very well chaired

If you give a meeting less than 10 what could have been improved?

If you give a meeting full marks what made it so successful?

Make some notes on the good and bad points of each meeting using the **Meeting Observations** tool which is in the toolkit. If you haven't already done so you can download the toolkit from [here](#).

The objective here is to raise your awareness of what really goes on at meetings. Sometimes we come away thinking the meeting was a complete waste of time. Sometimes we come away from meetings highly enthused.

### What makes the difference?

Take the opportunities to review and reflect on the data you have collected on the Meeting Observations tool.

You can use these observations and learning to improve your own meetings.

## Summary

1. **Book time in your diary** to work through the next 4 Chapters of this Guide – we suggest an hour a week for the next 4 weeks – this will allow you time to try the ideas.
2. **Print out** the Meeting Observations tool.
3. After each meeting you attend during the next week take a few minutes to **score the meeting and record** "What Was Good?" and "What Could Have Been Better?" on your Meeting Observations tool.
4. **Think objectively** on what makes a great meeting.

## Chapter 2 – “What to do BEFORE the meeting!”

*“Fail to prepare is to prepare to fail”*

Anonymous

### Purpose of this Chapter

To help you focus on the few key things that might save you time, whether you are chairing the meeting or just attending as a participant, and help you optimise the chances of the meeting being a success for you

### Tips

To help you use the content of this Chapter quickly ...

1. Refer now to the **5 Highlights below** for the best return on your limited time.
2. Try to keep in mind the objectives of the **Measuring the Value** section (see below) to make sure you are checking your progress and the effectiveness/value of these ideas.
3. Use the **Meeting Checklists** before your next meeting. The Meeting Checklists are in the toolkit. If you haven't already done so you can download the toolkit from [here](#).

### If you are a chairperson or participant:

1. Are you really clear why you need to attend the meeting at all? (either in chairperson or participant role?) – have a look at our Meeting Attendance Decider on the next page to help you reach a logical decision about the need for your personal face to face attendance.
2. Are you clear on what would constitute a successful meeting outcome?
3. Why not arrive 10 minutes early to check the facilities and greet your fellow attendees?
4. Have you reviewed the outcomes and actions from the last meeting for guidance?

### If you are a Chairperson:

5. Have you managed everyone's expectations in advance in terms of your planned start and finish times?

## ***Meeting Attendance Decider***

**Application:** This Decision Tool can be used to confirm that your personal attendance at a meeting is essential. We believe in many cases there are alternative ways of achieving the objective for you to be able to effectively contribute to discussions, debates and business decisions.

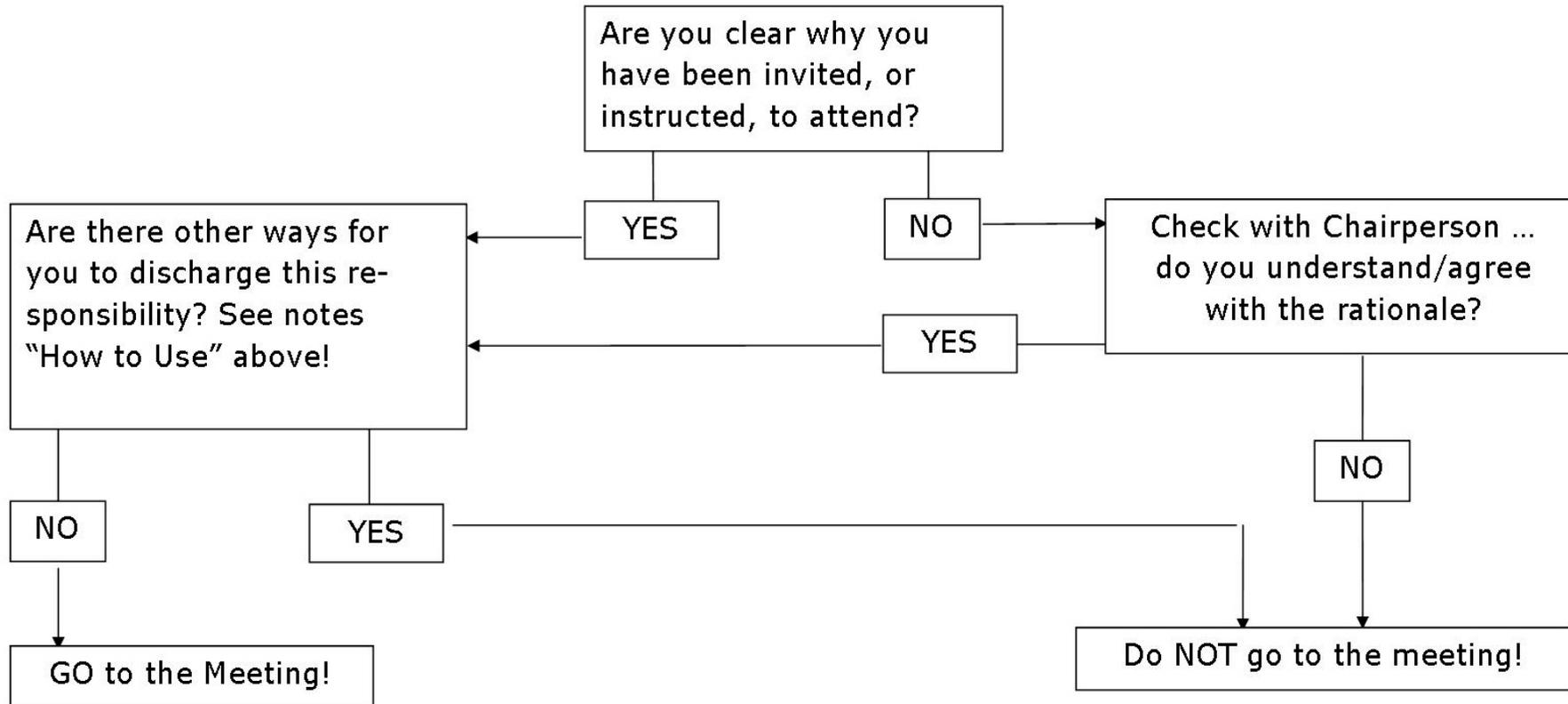
**Value:** The key value in looking at your meeting invitations in this way is for you to apply rigorous scrutiny to the need for you to actually attend in person or at all! If you apply this consistently the key value will be in terms of “freed up time” to do other important activities needed to meet your own and your organisation’s objectives.

**How to Use:** Use as a simple decision tree but let us summarise here a few alternatives to the face to face meeting ...

- Agree to only attend PART of the full meeting, aligning with the relevant agenda items appropriate for your input.
- Agree as above but agree with the Chairperson that you will dial in to the meeting, using audio conferencing facilities.
- Send your views and input to the Chairperson in advance of the meeting so that they can be treated as an input only.
- Send a substitute to the meeting appropriately briefed with your views and response to key issues.
- Do not go but agree to discuss off line any issues that are appropriate to your area of expertise.

The decision tree is shown in full on the next page.

### Meeting Attendance Decider



## ***Discussion***

Chapters 2, 3 and 4 deal with the “Before, During and After” time periods to help you focus on the essential advice in a chronological way.

We know everyone stresses the benefit of planning ahead in business but, with so much to do, deadlines to meet, it is sometimes difficult to free up the time to think ahead.

It is always easy to see the benefits of the previous tips but, more often than not, the pressure of work seems to limit meeting preparation time. Yet poor preparation often results in more ineffective meetings and a high failure cost in terms of confused participants and wasted time.

### **How easy is it to implement these tips?**

It comes down to planning and creating space for yourself to jot down your thoughts about what would constitute a successful meeting outcome. It’s about booking time in your diary to do this and, perhaps, showing the meeting start time in your diary as 15 minutes before the agenda start time so you can arrive early and greet fellow attendees and develop a sense of their expectations and mood.

In our experience, sometimes we are very optimistic about how long it takes to go from one meeting to another. Transport difficulties, poorly managed timekeeping on earlier meetings will now mean that you need to start building in sensible time contingencies so you always turn up on time.

It is worth gaining a reputation for good timekeeping – it implies your time is precious (which it is) and exudes professionalism too.

In this area it is important that YOU lead by example.

If circumstances outside of your control mean that you may be late, take the opportunity to alert other attendees, via one of your colleagues, your expected arrival time together with your apologies.

Finally it is also very important that if you set the time of your attendance at the meeting for one hour then you deliver against this.

Here are your next challenges ...

## For Chairpersons ...

### Challenge 2

Read through your **Meeting Observations** data and write down what you have learned about what makes effective and ineffective meetings. What are the recurring attributes which influence the outcomes?

### Challenge 3

- Before every meeting you will chair over the next two weeks, use the **Time Management Log** to note the intended Start and Finish times. After the meeting, note the actual start and finish times. The Time Management Log is in the toolkit. If you haven't already done so you can download the toolkit from [here](#).
- Book meeting preparation time in your diary and use the **Meeting Checklists** to prepare yourself for each meeting.
- Before every meeting you will chair over the next two weeks, use the **Meeting Outcome Planner** to note the meeting's objectives and success criteria. We want this to become a habit – something you do automatically before each meeting you chair. The Meeting Outcome Planner is in the toolkit. If you haven't already done so you can download the toolkit from [here](#).

## For Participants ...

If you won't be chairing any meeting over the next two weeks you have what may be an even bigger challenge!

### Challenge 4

1. Record the intended Start and Finish times of the meetings you attend and compare them against actual Start and Finish times using the Time Management Log. Make a note of the techniques that people use to ensure the meeting starts and finishes on time.
2. Look for the objectives and success criteria of the meetings you attend. If they are not clear to you, either ask in advance of the meeting for clarity or, ask for clarity right at the beginning of the meeting. Do not be content to let a meeting begin when you are either unclear about the meeting's objectives or its success criteria. It is both very unprofessional and an ineffective way of working.

**DO NOT LET YOURSELF OR THE CHAIRPERSON OFF THE HOOK!!!**

As you will see in Chapter 4 if the Chairperson doesn't do things in an effective way it's your responsibility to help him/her.

### Measuring the Value

It is important to measure your progress in implementing these ideas so we suggest you use all the tools we have provided. Make sure you keep these records for your meetings over the next two weeks so you can input what actually happened and therefore reflect on your actual performance.

In Chapter 3 we will be asking you to look at the records you have kept to see what you can learn about your own behaviours.

### Summary

- Read the **Meeting Observations** data to see what you can learn about the key features of effective meetings.
- Use the **Meeting Checklists** to help you prepare for your meetings.
- If you are chairing a meeting please use the **Meeting Outcome Planner** to make sure you are clear about the objectives and success criteria and how well you delivered against them
- Use the **Time Management Log** to monitor how well you are keeping to time, whether you are chairing the meeting or just being a very valuable participant.

## Chapter 3 – “What to do DURING the meeting”

*“You can tell whether a man is clever by his answers.*

*You can tell whether a man is wise by his questions.”*

Naguib Mahfouz - Winner of the 1988 Nobel Prize in Literature

### ***Purpose of this Chapter***

To help you be aware of what is expected during the meeting and how you can deliver against those expectations!

### **Tips**

To help you use the content of this Chapter quickly ...

1. **Refer now to the Tips below** for a simple way to try some ideas out straight away.
2. Use the **Meeting Hints for Participants and Chairpersons** at the end of this Chapter
3. Here are our top 5 highlights from the more detailed Meeting Guides which are listed as key reminders to optimise your meeting performance:
  1. Remember that, in the Chairperson role, YOU are in charge of the meeting.
  2. Remember that, as a participant you have a responsibility to make the meeting successful.
  3. Make sure you fully understand the meeting objectives and success criteria at the beginning of the meeting.
  4. Keep focused on the key issues at all times.
  5. If the meeting is going off track, try to bring it back to the agenda topic.

### ***Discussion***

#### **In the Chairperson role:**

It is important to remember that, more often than not, the success of the meeting is in your hands.

By setting out the objectives and ground rules up front you are setting expectations and are acting in a leadership role.

You may work in an organisation that has already drafted some “Meeting Rules”. If so, use them. Make sure there is a copy of the rules visible to all participants.

It is not appropriate to criticise behaviour inconsistent with the ground rules if participants are not briefed on them in advance. Some examples might be ...

- start and finish times
- mobile/laptop policy (i.e. switch off/not allowed!)
- only one speaking at one time
- no side conversations
- if you are not clear please speak up! etc.

If your organisation hasn't drafted any Meeting Rules you must create your own. If you are chairing a one off meeting it is appropriate to state the rules you require and ask if anyone feels unable to comply with the rules. If you are chairing a regular meeting, such as a monthly team meeting, it is important to facilitate a team discussion on the rules team members would like to have.

We have both attended meetings where late participants had to pay a fine because this is how the team had agreed to deal with lateness. (The fines went to a local charity).

However you need to be bold and confident in executing this role. You also need to have prepared well (which is why Chapter 2 is so critical) and think about the role you are playing and the body language you should be projecting throughout the meeting.

### **How your body language can help**

Think about...

- good posture (i.e. sitting properly and not laying back in the chair)
- keeping a professional approach (i.e. no flippant remarks or jokes if inappropriate to the subject matter)
- good eye contact to register that you are listening
- being courteous, asking questions for clarity (you may understand the speaker but, in your role as Chairperson, you need to make sure all participants understand).

It is also important that your style, manner and leadership remain consistent over the whole meeting period.

Try to avoid asking questions like, "Is that OK then?" or "Does everyone understand?" When people respond with "Yes" all you have learnt is that they can say, "Yes"!

Ask people to explain what their understanding is.

## How do I manage disruption?

Many meetings can deteriorate when participants feel the chairperson is not properly in charge and tolerates disruptive behaviour and interruptions. It is critical that you exert your authority and deal with disruptive behaviour firmly and fairly to give out a clear message to all participants.

Here are some examples of how meetings can be disrupted ...

- **People turning up late.** It is not appropriate for you to re-run the meeting for late arrivals – they will have to wait until the end or catch up themselves. You will need to tell them this as they arrive so they are clear that you will not disrupt your flow or lose the momentum on the item under discussion.
- **People multi-tasking during the meeting.** Ask people to leave who insist on leaving their mobiles on and answering calls or texts but give them one chance in case they have just forgotten to switch off. This can also include distractions due to side conversations or use of Blackberrys etc. For side conversations nip them in the bud immediately by asking the culprit to share the conversation with the rest of the participants or keep quiet so that one meeting is in progress not two or more. This requires a firm approach but there is no alternative – you either have control or you do not!
- **People who want to be star of the show.** Check who is contributing during the meeting and when one or more participants are monopolising the meeting make sure you tell them that you would like the views of others and then bring them into the discussion.

Sometimes participants adopt very assertive styles to try to influence the meeting outcome. It is your job to keep this in check and make sure that you are firm when they try to interrupt. If necessary call a comfort break to allow you to talk to the offending participant offline, away from others.

We all feel nervous on occasions but it is important that you project a confident, business image throughout. Some of us may need to “role play” this image a little in order to reflect this style. There is nothing wrong with this but it has to be consistent.

## Checking the Action Points

When someone agrees to take responsibility for an action point ask him/her to explain to the meeting his/her understanding of the action point. You'd be amazed how often someone else in the meeting says, “That's not what I thought the action point meant!” This is the only way to check that every participant has understood the action points. By doing this you will save an enormous amount of time after the meeting correcting action point activity.

Make sure the meeting secretary has captured all action points, owners and deadlines before closing the meeting.

### **How Do I Get Feedback?**

If you are interested in improving the quality of the meetings you chair you must ask all participants for some feedback. Do this quickly at the end of the meeting. Here is a link which offers a free, confidential, feedback service to help you improve the way you chair meetings ...

<http://www.pansophix.com/resources/chairperson-feedback-questionnaire.html>

### **In the Participant role:**

Sometimes it is necessary, for you as a participant, to take the steps necessary to influence the meeting focus and conduct. This is not an attempt for you to take over the chairing of the meeting but for you to HELP the Chairperson as appropriate.

### **How can I help the Chairperson?**

Sometimes you will need to be brave! Accept the challenge. Many meeting attendees simply attend. You, on the other hand, are going to participate!

You have to decide the timing of your interjection - this is where you have to exercise good judgement!

In some cases you may feel that there are not many natural silences for you to interject. You therefore need to be bold and register, with your body language, you are not comfortable with what has been said and you may need to interject with ...

- "Can I please ask a question on this aspect, (or this point)?"

The Chairperson should acknowledge your intention and either, let you ask the question immediately, or tell you when it is convenient for you to raise the issue.

If you feel the meeting is in a rut you need to be bold and ask questions like ...

- "Can you please help me understand how this moves us on in resolving this issue?"
- "In what way does this relate to the decision we need to make?"
- "Can someone please explain to me again why this is the only option we are proposing?"

Often meetings can become bogged down in issues which are not critical to the decision being made or to the successful conclusion of the meeting subject. It is important that, if you are not clear on how the debate is helping the subject matter, then you need to express your views politely but firmly.

### **Will I appear as disruptive and a delay to progress?**

On the contrary, there will be others at the meeting who will appreciate you voicing their concerns for them. Your input should always be viewed as constructively helpful and insightful in terms of focusing on the fundamental issues.

Notice carefully how the above questions are worded. You are taking responsibility for not understanding and not putting any blame on others.

To execute this properly therefore you need to always be polite, adopt the stance that you are seeking clarification and keep your tone and volume under control.

Sometimes when you are frustrated at meetings your emotions can get the better of you unless you calm down and think of a way of putting your question across in a calm and professional manner. So interject when you think it appropriate and do not rush with your question and remember to speak clearly. Writing the question down can act as a useful prop in the “heat of the moment”!

### **How can I help influence the meeting more effectively?**

You need to be focusing on what others are saying and make notes to remind you to flag up concerns at the appropriate time. Often further debate may result in your initial concerns being answered but at least your notes allow you to check these off methodically.

Once again, it is important that YOU lead by example.

Outcomes are driven by personal behaviour so use checklists/guides etc to remind you what you need to do on a consistent basis.

### **What about Conference Calls – how can I make these more effective?**

Many of the principles used in making face to face meetings more effective still apply to conference calls. In fact because there is no visual element the body language aspects can be quite limited – we will cover this later in this Section.

It is still useful to have an agenda, circulated by email to participants in advance, which includes ...

- The objective of the conference call and planned participants.
- Broad timings for each component of the agenda together with the person on the call who is expected to lead the discussion.
- Start and Finish times.

It is important to know who is on the call and when people speak to know who is speaking – if they do not announce their name it is the chairperson's job to ask and remind them to do this throughout the call.

As Chairperson it is important to keep a mental or written note about who has input to the discussion – if some participants are silent try to bring them in by asking for their views.

In terms of body language it can be beneficial to stand up and contribute when you have an important point or decision to make. Always speak clearly and check understanding – you have no visual feedback in this respect.

Keep conference calls short and sweet – there is nothing worse than sitting for long periods with a headset and microphone – and avoid the inclination to check your emails or browse the web whilst on the call.

All very obvious we know but we are increasingly surprised to hear of conference calls lasting 2-3 hours – our advice is one hour maximum.

### What about minutes?

If it is important that minutes of the meeting are taken we recommend looking though **A Useful Guide to Minute Taking** which can be obtained [here](#).

### What about reviewing the meeting?

If you want to make your meetings more effective and efficient it is important to have some sort of review at the end of the meeting. **This should not take long.** People will want to be leaving to get their next meeting, progress other commitments, go home etc.

- **Suggestion 1 – verbal review.** Ask each attendee to score the meeting out of 10 where 10 = Very Effective Meeting and 1 = A Complete Waste of Time. Ask for one sentence on “What went well?” and “How do we improve the meeting?” There should be no discussion about people's comments. The Chairperson should follow up the comments after the meeting and take some action before the next meeting.

- **Suggestion 2 – paper review.** Use a questionnaire and ask attendees to complete it before they leave. An example is given at the end of this chapter.
- **Suggestion 3 online review.** Set up an online questionnaire for attendees to complete in their own time after the meeting.

We prefer suggestions 1 & 2 because you can ensure attendees give their feedback. Attendees may be too busy or forget to complete an online questionnaire.

### So What Do I Need To Do?

Read the **Hints for Participants and Hints for Chairpersons** at the end of this Chapter and decide on what hints you can try out over the next two weeks.

### Challenge 5

1. Be bold and take on hints that do not currently reflect the way you behave at meetings!
2. Reflect on the instances where the outcomes in practice were different from your aspirations before the meeting.

### Measuring the Value

You will have established already that we are keen on you taking on these ideas and measuring improvements in your effectiveness in participating in meetings.

So refer to the full **Hints for Participants** and **Hints for Chairpersons** provided at the end of this Chapter.

At this point it is worth reviewing the records you have kept as suggested in Chapter 2 to see what you can learn about your own behaviours.

#### As the Chairperson are ...

- Your meeting agendas always on the ambitious side?
- You getting feedback you can use to help you improve the way you chair meetings?

#### As a participant are ...

- People starting to notice your attention to good timekeeping?
- You feeling more confident you can influence the outcomes of meetings more effectively?
- You starting to feel how this changed behaviour this may start to become the normal way you do business?

## **Summary**

- **Keep observing what factors influence the success of meetings** from both the participant and chairpersons viewpoint.
- Use the **Hints for Participants and Hints for Chairpersons** for a reminder of the essential behaviours for successful meetings.

The next page shows an example a **Meeting Review Questionnaire**. If you would like an MS Word version so that you can modify it to your own requirements your can download it from ...

<http://www.pansophix.com/resources/meeting-review.doc>

Page 21 shows the **Hints for Chairpersons**. If you would like a separate version of this you can download it from ...

<http://www.pansophix.com/resources/hints-for-chairpersons.pdf>

Page 23 shows the **Hints for Participants**. If you would like a separate version of this you can download it from ...

<http://www.pansophix.com/resources/hints-for-participants.pdf>

## Meeting Review

Name:

Please circle one number for each statement

### 1. At the start of the meeting I understood its purpose

Strongly disagree	Disagree	Undecided	Agree	Strongly agree
1	2	3	4	5

### 2. I understood how the meeting was intended to flow in terms of agenda

Strongly disagree	Disagree	Undecided	Agree	Strongly agree
1	2	3	4	5

### 3. I understood my role at the meeting

Strongly disagree	Disagree	Undecided	Agree	Strongly agree
1	2	3	4	5

### 4. All participants expressed themselves openly and honestly

Strongly disagree	Disagree	Undecided	Agree	Strongly agree
1	2	3	4	5

### 5. Agreements were explicit and clear

Strongly disagree	Disagree	Undecided	Agree	Strongly agree
1	2	3	4	5

### 6. All participants listened carefully to each other

Strongly disagree	Disagree	Undecided	Agree	Strongly agree
1	2	3	4	5

### 7. I felt able to fully contribute to the discussion and decisions

Strongly disagree	Disagree	Undecided	Agree	Strongly agree
1	2	3	4	5

### 8. The meeting achieved its intended purpose

Strongly disagree	Disagree	Undecided	Agree	Strongly agree
1	2	3	4	5

### 9. The meeting lasted the right amount of time

Strongly disagree	Disagree	Undecided	Agree	Strongly agree
1	2	3	4	5

### 10. I felt my time was well spent at this meeting and I feel good about the outcomes

Strongly disagree	Disagree	Undecided	Agree	Strongly agree
1	2	3	4	5

On the other side of this questionnaire please make one suggestion that you think will make our next meeting more effective.

## Hints for Chairpersons

**Application:** Use this list of hints to remind yourself what you need to do and how you need to behave to effectively run the meeting as Chairperson.

**Value:** This Hints for Chairpersons list allows you to quickly refresh your approach to the meeting BEFORE you enter the meeting! If you need to role play to comply with these tips be bold and do it!

**How to Use:** Use as a refresher but why not try to jot down as many of these tips as you can remember 5 minutes after scanning them? This will help you firm up in your mind the key points to put into effect at the meeting itself.

1	Remember that YOU are in charge of the meeting.
2	Explain meeting objectives and success criteria up front.
3	Let participants know about domestics and meeting rules up front i.e. mobiles off, start/finish times, fire drill arrangements etc.
4	You have the responsibility to set the scene and mood.
5	Keep focused on the key issues at all times.
6	Manage interruptions in a firm and fair way. DO NOT ALLOW THE MEETING RULES TO BE BROKEN WITHOUT CONSEQUENCE!
7	Interject when necessary to keep on track but apologise for the interruption.
8	If you feel someone is taking too long or not being relevant, interrupt them and say "I'm sorry but could you just help me understand how this helps us achieve our objective(s)?"
9	Be prepared to trade off less important issues.
10	If appropriate, suggest rather than propose. E.g. "I would like to suggest that ..." rather than "I think would should ..." You will increase the chances of being supported.
11	Think "Outside the Box" and consider other views.
12	Involve attendees who are not contributing.
13	Be polite and professional at all times.
14	Look the part – and act as a "Polite Bully!"
15	Make sure you are arranging for all meeting actions to be captured by a willing volunteer!
16	Ask Action Point holders to explain to the meeting the action points they are taking away to check understanding.

17	Ask participants for feedback.
18	Thank participants for their contributions.
19	If appropriate, confirm with participants when the minutes will be sent out.
20	Set a date for any follow up meeting(s).
21	If you finish early, let the participants leave and benefit!

## Hints for Participants

**Application:** This list of hints provides a reference list of the key behaviours and objectives you need to apply to make sure you perform well at the meetings you decide to attend.

**Value:** The key value is for you to continually refer to this list and decide what specific elements you are going to consciously take on board for your next meeting. This will encourage you to take on these aspects as part of your normal business behaviour as quickly as possible.

**How to Use:** Review the list and make sure you make a note of any items that you would not do naturally and build these into your meeting style.

1	If you arrive late wait for a suitable moment before apologising. Accept responsibility – don't say, "The traffic was bad" say "I should have set off earlier".
2	Take the opportunity to introduce yourself to other participants.
3	Turn off your mobile telephone, pager etc. Do not accept calls during the meeting.
4	If the chairperson doesn't explain the objectives, success criteria, agenda items and timings at the beginning of the meeting do not let the meeting start without asking what they are.
5	Keep good eye contact with the speaker to indicate your interest in the subject.
6	Keep good posture and focus throughout the meeting.
7	Make sure you ask your top 3 questions at the appropriate time during the meeting.
8	Always ask questions to seek clarification or to reinforce your point.
9	If you can, try to build on what other participants are saying.
10	YOU have a responsibility to make the meeting successful. If you don't understand where the meeting is going or why someone is talking about a specific point ask for clarification with a question like, "Can you help me understand how this helps us achieve the meeting's objective?"
11	Do not indulge in any side conversations – it is unprofessional and rude.
12	Be prepared to stand your ground if you feel strongly about something.
13	Remember every meeting is a face to face influencing opportunity.
14	Always leave the meeting on the time you agreed.
15	Be prepared to trade off issues that are not critical to your, or the meeting's, objectives.
16	Keep your own and the agreed meeting success criteria in mind at all times.
17	When you volunteer to own, or receive, an action point, ask the chairperson if you can check your understanding of the action point with everyone.

18	If you can, why not sit in a seat which is easily visible to the Chairperson so you are always "on the radar".
19	If the chairperson doesn't run a review session suggest it might be helpful to hear everyone's view on how effective the meeting has been so you can take any learning into the next meeting.
20	Thank the chairperson, when you leave, for the opportunity to take part in the meeting.
21	Give the chairperson some feedback on how he/she ran the meeting.

## Chapter 4 – “What to do AFTER the meeting!”

*“God grant me the serenity to accept the things I cannot change,  
the courage to change the things I can,  
and the wisdom to know the difference.”*

Reinhold Niebuhr - Protestant theologian and author of many books including  
“The Nature and Destiny of Man”

### **Purpose of this chapter**

To help you make sure the meeting was, in fact, successful!

### **Tips**

1. Review how your meetings have gone in the context of your objectives and success criteria.
2. Set aside some personal time to make sure you do this.
3. Use the **Meeting Performance Reviews** (in the toolkit) to assess your performance in both the Chairperson or Participant roles.

### **Discussion**

In a sense, this aspect of the Guide provides the acid test of successful management of your meetings.

We have raised the need for excellent preparation and clarity of purpose in Chapter 2 and it is impossible to achieve the desired result without taking these points seriously.

Sometimes it all comes down to effective time management to allow you to invest in the meeting – returns do not arise without this investment.

### **How do I gain “time”? – I am so hard pressed!**

Strangely enough time is gained by behaving in the way we are recommending which then provides you with space to think ahead of the game which then leads to successful meetings. It should become a welcome virtuous circle.

However just consider the opposite scenario where you are always rushed, ill prepared and seem to be forever chasing through the day.

### **You need to break this cycle NOW!**

In the short term you may have to spend an hour or two of your Sunday evenings preparing for the week ahead to allow you the time to prepare well and therefore execute well in the week ahead.

Once this becomes automatic you will find you will create time within the normal working week to carry out this preparation and focus.

And you can then have your Sunday evenings back again!

### **How can I remember to apply these tips and ideas?**

In the early days of applying these tips and asking these questions you will probably need to keep a hard copy of these tools either in your briefcase or saved as files on your laptop/PC or Personal Digital Assistant for easy reference.

However, after a while, by continual application, we believe these ideas and tips will become part of your "Business as Usual" style and not only will you gain in terms of reputation but you should gain in personal time too.

### **What about taking Minutes?**

As we mentioned in the previous chapter (page 16) minutes can be an important part of the meeting process and provide the following advantages ...

- a record of what decisions/actions were made at the meeting together with owners and timescales – it makes participants accountable.
- a useful way of briefing those not attending the meeting about what happened and who owns the actions.

We offer **A Useful Guide to Minute Taking** which simply explains the 4 types of minutes and how you can be an effective Minute Taker and not fear the task! It is available for £4.95 on the Pansophix Online Store and you can find it by clicking [here](#).

### **So what's in it for me?**

Well - we have always appreciated being part of well run and effective meetings. Meeting people face to face always provides a crucial opportunity to influence and collect views about business issues.

We're sure you will have appreciated that both Chairperson and Participant have key roles to play in delivering successful meeting outcomes and need to be performed with confidence, style and professionalism.

When we both reflect on those meetings that stood out as an excellent use of our time we can always link them back to first class professional preparation and taking on the important responsibility to help deliver success whatever your role!

As participants we have often found that on too many occasions people attend and contribute very little. So the question that needs to be asked is ...

### **To what extent can I realistically make a major impact on the meeting itself?**

A good question! Let us share a real life example.

Several years ago Ian was acting as consultant to a large company-wide change programme and was asked to facilitate a meeting for one of the change teams.

This was a regular, one day per month meeting dealing with the issues with the change programme itself.

At the beginning of the meeting Ian asked each attendee, "What is the purpose of this meeting?"

Yes, you guessed it, each of the 9 participants gave a different answer!

After an interesting, frank and thorough discussion the attendees concluded that, for each perceived purpose, the work was already being covered by other people in the organisation!

By midday the participants had decided there was NO need to hold any more meetings and the forum was disbanded!

**A simple question that had a significant beneficial outcome.**

### **So What Do I Need To Do?**

#### **Challenge 6**

**Complete and review your Participant and/or Chairperson Meeting Performance Reviews** over the next week and if any of your scores were below 7 out of 10 decide what you will do differently next time. The Performance reviews are in the toolkit which you can download from [here](#).

#### **Measuring the Value**

How successful have you been in keeping the records we have suggested in this Guide?

Are you now keeping records automatically and remembering the essential elements of the Checklists and Guides?

More importantly, have they helped to improve your performance from a personal perspective?

Have others noticed the change in your behaviour?

What feedback have you had?

### ***Summary***

Unless you review each meeting objectively you will not be able to assess your own performance objectively. Use your Meeting Performance Reviews to find where you can improve.

You need to KEEP trying new approaches which suit your own style and personality.

In the next Chapter we bring together all the key themes, and summarise the complete Toolkit included in **A Useful Guide to Managing Meetings**.

## Chapter 5 – Summary

*"What would you attempt to do if you knew you could not fail?"*

Robert Schuller - Author of "Tough Times Never Last But Tough People Do!"

### ***Purpose of this Chapter***

To provide a summary overview of the key themes embedded within **A Guide to Managing Meetings**.

### **Guide Summary**

1. Always ask "Do I need to attend the meeting at all?!"
2. Think ahead about the successful outcomes you are trying to achieve BEFORE the meeting.
3. Collecting data to measure performance provides a useful benchmark to monitor improvements.
4. Use the **Checklists** and **Hints** to help you become more organised in how you prepare for meetings.
5. Always be prepared to try out new ideas and, if they work, build into your normal behaviour.
6. You need to LEAD BY EXAMPLE in order to sell your standards!
7. Keep observing to be able to understand what makes both good and bad meetings.
8. Always reflect objectively on your performance in order to fine tune future improvements.
9. Keeping focused on your own time management can provide you with a significant return on your investment.
10. As Chairperson, always remember that YOU are in charge of the meeting.
11. As Participant, always be prepared to intervene to make the meeting a success.

## So What Do I Need To Do?

We challenge you to continually use these ideas, guides and tools to increase your effectiveness before, during and after meetings.

Use the tools until they become part of the normal way you do business!

## Workshops

We also run intensive (but fun!) one day workshops showing how to put **A Useful Guide to Managing Meetings** material into practice.

If you would like to find out more, please email us at [enquiries@pansophix.com](mailto:enquiries@pansophix.com) or call us on **0845 260 2820** and we will talk through the content, dates etc.

We hope you have enjoyed this Useful Guide and wish you well with your business endeavours.

## Feedback

As we are always trying to improve our Useful Guides we would appreciate any feedback you can give us on **A Useful Guide to Managing Meetings**. Please click on the link below to access our online feedback form ...

<http://www.pansophix.com/useful-guide-feedback.html>

If we use your feedback to improve **A Useful Guide to Managing Meetings** we will email you a copy of the updated version.

## Useful Guides

Our range of **Useful Guides** is constantly growing. Please click [here](#) to see the current range.

As a purchaser of one of our Useful Guides you are eligible for free access to our online Learning Support Centre. Please use this link to access our growing range of mental exercises, tips and tools ...

<http://www.pansophix.com/learning-support-centre/index.html>

Best wishes

Steve and Ian  
0845 260 2820