

MEETING MANAGEMENT



INSTRUCTOR GUIDE 1-DAY COURSE

I-RDQ[®]

MEETING MANAGEMENT

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Instructional design and learning philosophy

We are committed to providing the best core-skills content possible for Instructor-Led Training (ILT). The following principles are applied in the development of programs:

Sound Instructional Design

All course content is developed using a variety of research techniques. These include:

- Brainstorming sessions with target audience
- Library research
- Online research
- Customer research (focus groups, surveys, etc.)
- Subject Matter Experts (SME)
- Interviews with trainers

Expert instructional designers create imaginative and innovative solutions for your training needs through the development of powerful instructional elements. These include:






- Learning objectives — effective tools for managing, monitoring and evaluating training
- Meaningfulness — connects the topic to the students' past, present, and future
- Appropriate organization of essential ideas — helps students focus on what they need to know in order to learn
- Modeling techniques — demonstrate to students how to act and solve problems
- Active application — the cornerstone to learning — helps students immediately apply what they have learned to a real-life situation
- Consistency — creates consistent instructions and design to help students learn and retain new information
- Accelerated learning techniques — create interactive, hands-on involvement to accommodate different learning styles

Application of Adult Learning Styles





Adults learn best by incorporating their personal experiences with training and by applying what they learn to real-life situations. Our experienced instructional designers incorporate a variety of accelerated learning techniques, role-plays, simulations, discussions, and lectures within each course. This ensures that the learning will appeal to all learning styles and will be retained.

Course timing

Chapter One: Preparing Yourself and Others




Type of Activity	Segment	Time
	Introduction	15
	Ask critical questions	10
	Make arrangements	10
	Build an agenda	15
	Assign roles	15

Chapter Two: Group Process Skills







Type of Activity	Segment	Time
	Open the meeting	10
	Set ground rules	15
	Ensure participation	10
	Keep the process moving	25

Course timing

Chapter Two: Group Process Skills (cont.)






Type of Activity	Segment	Time
	Practice	30
	Reduce distractions	15
	End the meeting	5

Chapter Three: Problem Solving and Decision Making

Type of Activity	Segment	Time
	Problem solving self-assessment	10
	A three-step model Step 1: Define and analyze the problem	20
	Step 2: Generate alternatives	20
	Step 3: Make a decision	30
	Team consensus assessment	5
	Is your solution working?	10

Course timing

Chapter Four: Effective Follow-up

Type of Activity	Segment	Time
	Meeting minutes	10
	Ensure follow-up	20
	Team accountability chart	15
	Learn from meetings	20
	Wrap-up	10

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Course objectives

Successful completion of this course will increase your knowledge and ability to:

- ◇ Prepare for a facilitation event by asking critical questions
- ◇ Build an effective agenda
- ◇ Begin and end meetings on time
- ◇ Avoid distractions that lead a group off track
- ◇ Solve problems in a group
- ◇ Choose the most appropriate form of decision making with a group
- ◇ Employ group process skills to generate discussion and keep it moving productively
- ◇ Handle “problem” personalities
- ◇ Write meeting minutes that get read
- ◇ Increase accountability for individual tasks and follow-up items

Fundamentals of Effective Facilitation

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Course objectives

- Prepare for a meeting by asking critical questions
- Build an effective agenda
- Begin and end meetings on time
- Avoid distractions that take a meeting off track
- Solve problems during a meeting

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Course objectives (cont.)

- Choose the most appropriate form of decision making
- Employ facilitation skills to generate discussion and keep it moving productively
- Handle “problem” personalities
- Write meeting minutes that get read
- Increase accountability for follow-up items

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Chapter One



PREPARING YOURSELF AND OTHERS

Activity: Have participants brainstorm in small groups to identify three or four results they look for in a meeting. Share with the entire group. Suggestions: Clear results, efficient use of people's time, equal participation and a sense of accomplishment.



Introduction

When you walk into a typical meeting at your organization, what do you expect? The company party line with no real information, or an honest exchange of ideas? People actively pretending to listen? Or, do you expect your organization's meetings to be consistently imaginative, inspiring and powerfully productive?

How do you know your facilitation skills are effective?

- ◇
- ◇
- ◇
- ◇

Ask critical questions

- ◇ Do we need to meet?
 - Will there be one-way or two-way sharing of information?
 - Can the information be conveyed in a memo, a brief report or a phone call?
- ◇ Who needs to attend?
- ◇ What are the objectives for the meeting?
 - What decisions need to be made?
 - What actions need to be taken?
 - “By the end of the meeting, I want the group to ...”
 -
 -
 -
- ◇ How will we evaluate the success of the meeting?
 - Did we meet our meeting objectives? Why, or why not?
 - Is another meeting required? If so, for what purpose?

Do we need to meet?
Obviously, with one-way sharing of information there are a variety of ways to do this without holding a meeting: E-mail, post on company's Intranet, phone call. By cutting down on unnecessary meetings, you'll increase participants' motivation to attend meetings that are necessary.

Who needs to attend? Invite only those people who need to participate; others who merely need to know the outcome can be notified afterward.

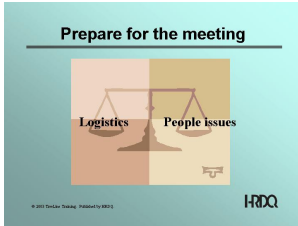
What are the objectives?

Activity: Have participants come up with potential meeting objectives using the space provided on this page. Some examples: “... generate three new ideas for increasing sales,” “... analyze a shipping problem,” “... decide on a new vendor.”

Developing objectives leads directly to setting agenda items. The more concrete your objectives, the more focused your meeting will be.

Evaluating the success of the meeting: This is another area in which having specific objectives will help. They will give you something concrete to measure against.

You must balance logistics and people issues when preparing for a meeting.



Logistics: Discuss the importance of having a well-stocked meeting room—items such as whiteboards, flip charts and extra paper, markers, tape, scissors, etc. Additionally, mention the benefits of using modern meeting tools such as interactive white boards that let you access computer-based information and record and print meeting information.

People issues: Mention that this is an area of pre-planning that people tend to ignore. However, thinking about it ahead of time can allow the facilitator to be prepared and avoid unpleasant surprises.

Level of formality: Meetings can be casual or formal; the key is to make certain everyone is on the same page.

Power issues and group dynamics: Knowing about these in advance can't necessarily stop them from occurring; however, awareness can help the facilitator recognize potential minefields and trouble spots that might occur during the meeting.

Make meeting arrangements

Pre-meeting logistics

- ◇ Meeting location
- ◇ Room set-up
 - U-shape
 - Conference table
 - Circle
 - Other:
- ◇ Equipment needed
 - Overhead projector or other projection equipment
 - Computer
 - Video and monitor
 - White board and/or flip chart and markers
 - Telephones

Pre-meeting people issues

- ◇ Level of formality
- ◇ Awareness of power issues
- ◇ Review group dynamics, if known
 - Possible dissension
 - Possible groupthink
 - Possible hidden agendas
 - Likelihood of healthy conversation and agreement

Build an agenda

Creating an effective agenda is one of the most important elements for a productive meeting.

What to include

- ◇ Date, time, and location
- ◇ Brief description of the meeting objectives
- ◇ List of topics to be covered, and who will address each topic and for how long
- ◇ Any helpful background information and/or instructions for participants

How to put it together

You're responsible for planning your project meeting this month. Arrggh!!
What to do?

- ◇ Send an e-mail stating there will be a meeting, the goal of the meeting, and when and where the meeting will be.
 - Ask those invited to accept or decline the invitation to the meeting.
- ◇ Ask participants requesting an agenda item to contact you no less than five days before the meeting (if possible) with their request and the amount of time they will need to present the item.
- ◇ Summarize the requests.
 - Determine if each item is directly related to the goals of this particular meeting.
 - If one is not, respond to the requester and recommend the item be covered at another meeting or in another manner.
 - Be realistic about how many items can be covered in the meeting.

What's the most important thing you should do with your agenda? Follow it!

Always use agendas

- Date, time, location
- Objectives
- Topics and time allocation for each
- Background information and/or instructions
- Avoid agenda overload!

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Benefits of using agendas

- Provides a timed outline for the meeting
- Can be used as a checklist to make certain all information was covered
- Gives participants an opportunity to prepare (as long as it's distributed ahead of time)
- Provides focus for the meeting

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How to put it together: Make it clear once someone has accepted the invitation to the meeting, you expect them to attend.

If too many agenda items are submitted, decide which ones are most important, or need to be covered first. For the rest, respond to the submitters, and let them know why their item(s) won't be covered in this particular meeting.

Allocating time: Never fill the entire time with agenda items; you need to allow some "elbow room" and time to summarize and wrap up. If the meeting ends early, people will be pleased. But if the meeting runs long, people will be very unhappy.

Send the agenda to all the meeting participants two (or more) days before the meeting.

Activity: Ask each participant to complete this form for an upcoming meeting. Share agendas with the entire group; note items that were added or deleted.

The item/issue column should also include the action required, such as discuss, brainstorm, decide, etc.

Remind participants that while an agenda is necessary for every meeting, its form can be flexible. In this example, the last column on the right (follow-up) is blank and intended to be used to record any action items that are required after the meeting.

Note: A blank sample agenda is included in the appendix.

Sample meeting agenda

Name of group:			
Purpose:			
Day and date:		Time:	
Location:			
Attendees:			
Item/Issue	Champion	Time	Follow-up
1.			
2.			
3.			
4.			
5.			

Assign meeting roles

If a group meets regularly, rotate the roles listed below so everyone has an opportunity to perform these functions and responsibilities.

Facilitator

- ◇ Guides the meeting. Covers the agenda items while encouraging even participation and positive group functioning

Timekeeper

- ◇ Keeps track of time. Helps the group begin and end on time. Pays attention to specific agenda items, and stops the group when it is going beyond established time limits

Recorder

- ◇ Helps the group remember important items. Records meeting minutes, decisions, commitments, action items, assignments, deadlines

Prompter

- ◇ Helps the group stick to its ground rules. Respectfully offers reminders, rather than accusations, when people stray from the rules

Participant preparation

- ◇ Distribute pertinent information prior to the meeting
 - Updates
 - Background information
 - Research
- ◇ Assign an action, if appropriate

By rotating roles, everyone will have an opportunity to “walk a mile in someone else’s shoes.” That should develop an understanding of the importance of each role, and how difficult it can be to fulfill the responsibilities of a particular function.

Note: The facilitator’s role is so important we devote the entire next chapter to it.

The prompter role can be filled by the facilitator; however, it’s very helpful to separate these responsibilities and allow the facilitator to concentrate on covering the agenda (and not be seen as the “bad guy”). Additionally, the prompter should be discreet. If just one person is continually breaking a rule, the prompter could sit next to that person or pass him or her a note, (both of which would be difficult to do while also acting as facilitator).

If participants are informed about the details before the meeting begins, your meetings will become more focused, and more time can be spent dealing with the important issues. Examples of assignments include: “Think of one possible solution to an identified problem.” “Think of your biggest success since the last meeting.”

