Managing Meetings
Quick Reference Guide

Should a Meeting be Held?

Before scheduling a meeting, it's important to decide if a meeting is truly necessary. Ask yourself:

Why am I scheduling this meeting?

Think about everything you want to cover and how much time it will take.

What do I want to accomplish?

If you can't answer this question, you're not ready for a meeting. Write down a list of goals to be accomplished in the meeting and get the answers you're looking for.

What will be shared or decided?

Determine what will be decided on in the meeting and think about how you'll get the information from attendees. Do you want to have an open discussion, do a show of hands, or have people respond in an email?

Who will be attending?

Think about the key decision makers that need to attend. Don't include anyone who's not needed in the conversation; it will be a waste of their time.

Types of Meetings

When you first start planning a meeting, you'll need to identify what kind of meeting it is.

Report or Information Related

Includes things like presentations, debates, keynotes, or lectures where the main goal is to share information.

Decision-making or Problem-solving

The most common kind of meeting. Includes things like information gathering and sharing, brainstorming, assessing options, and coming to a common agreement.

Training and Skill Building

This could be for training a new employee, or to train existing employees about a new procedure or job role.

One-On-One

Between you and one other person. They help managers oversee employee productivity and development.

Did You Know?

37% of employee time is spent in meetings

$37 billion a year is spent on unnecessary meetings

39% of participants admit to dozing off during a meeting

47% consider too many meetings the biggest waste of time

Source: www.meetingking.com

Remote Meetings

Once you decide to hold a meeting, determine if any or all of the participants will be joining remotely.

When planning a remote meeting you need to:

- Ensure you have the necessary software installed on your computer.
- Get familiar with the meeting software before the call.
- Have a microphone and web cam available and have them properly configured.

When leading a remote meeting…

1. Be early.
2. Record the meeting for those unable to attend.
3. Welcome each person as they join.
4. Ask questions to promote engagement.
5. Have attendees mute their mic when not speaking.

Some of the most important work is completed before the meeting even begins. A well-developed plan sets you up for success. In the planning stage, you'll determine 3 important items.

The Meeting Objective

A clear objective should:

- Allow potential attendees to determine if they should attend the meeting.
- Define the meeting purpose so people in charge of presenting know what material to prepare.
- Be a way to measure if the meeting was successful.

The Meeting Agenda

Items to consider in an agenda:

- **Priorities** - What absolutely must be covered in the meeting?
- **Results** - What needs to be accomplished when the meeting is over?
- **Sequence** - Does the sequence you cover the topics in matter?
- **Timing** - How long should the meeting last and how long do you have to talk about each topic?

The Meeting Time

When determining a time:

- Pick a time that works for all required attendees.
- Avoid scheduling meetings early in the morning or around lunch time.
- Account for attendees joining from different time zones.
- Keep the meeting length as short as possible.

Delegate Responsibilities

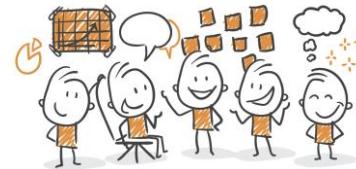To ensure the meeting tasks are accomplished, assign specific tasks to specific people. When delegating:

- Address each individual.
- Set clear objectives and timelines.
- Make yourself available for input after the meeting.
- Keep track of progress.

Maintain Effectiveness

It's critical to keep the meeting on track so no one's time is wasted. Common problems include:

- **Interruptions** - Remind people to stick to the agenda. Suggest they discuss any concerns with you after the meeting.
- **Conversation dominators** - Thank them for the input but ask that they email additional thoughts after the meeting.
- **Tangents** - Write outside topics in a parking lot. Cover them at the end if there's time. If not, address them in an email or separate meeting.

Take Notes

Note taking is important to a successful meeting. You need to know what happened, know who's responsible for what, and have follow-up information to send out afterwards.

The actions taken as the meeting ends and afterward determine the meeting's success.

When closing the meeting…

- Open up the floor to give everyone a chance to add their comments and questions.
- Don't let it drag on. Answer any last important questions, tell attendees to email any additional questions, and end on time.
- Be nice and mean it! After concluding, casual conversation that's not meeting-related and a sincere thank you goes a long way.

After the meeting ends…

- Send out meeting notes to attendees and those who missed the meeting.
- Store meeting documents in a central location where attendees can find them later.
- Check up on action items to make sure tasks are completed. Give a gentle nudge if someone needs a reminder about a task.

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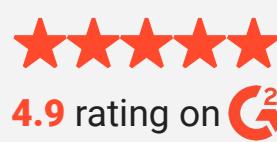Work/Life Balance

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