Meeting Management:  
It Takes a Team!

This information was prepared by HR/Organizational Development and Training, Tufts University. HR/ODT is a resource for all Tufts employees. Some of our services include training, team building, strategic planning, process improvement, the Tufts Performance Development Program, Periscope, meeting and group facilitation, performance coaching, professional development, and supervisory development and support.

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Table of Contents

Meeting Tips and Skills ................................................................. 2
A Checklist: Four Stages of the Meeting Process ....................... 3
Action Plan .................................................................................. 4
Questions to Ask Yourself .............................................................. 4
Encourage Participation ................................................................. 5
Visuals! ...................................................................................... 5
Suggested Meeting Ground Rules ................................................ 6
Meeting Record Template .............................................................. 7

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http://hr.tufts.edu/1172048104448/Human_Resources-Page-hr2_1205143246620.html.
MEETING TIPS AND SKILLS

Have you ever attended a meeting that ended up being a waste of time? Nothing seemed to get accomplished; the agenda was unclear; people were late...or didn't even show up.

This, unfortunately, has happened to many of us, but it doesn't need to continue. There is such a thing as an effective meeting!

WHY HAVE A MEETING?

- Meetings are an important forum for keeping open channels of communication. They provide us with what is often the most effective vehicle for sharing ideas and information. It is important for a team or work unit to be clear about upcoming projects or progress on work that is currently underway, and frequently it is a staff (or other) meeting that provides the best means of doing this.

DO WE REALLY NEED A MEETING?

- In spite of the usefulness of meetings, there are times when a meeting may not be the best choice. Perhaps a phone call or an e-mail message is more appropriate, or a quick discussion with another individual is all that is really required. Evaluate why you are going to meet, and make a conscious decision about what is appropriate in this particular case.

DO WE HAVE THE RIGHT PEOPLE?

- After deciding if a meeting is the best way of sharing information or ideas, it is important to consider whom to include. Who has relevant information or knowledge? Who will be involved in the decision making process? Who will be significantly affected by any decisions made? Who might be able to lend important insights or ideas?
A CHECKLIST: FOUR STAGES OF THE MEETING PROCESS

Planning Stage

- I know why we are having a meeting before I come to the meeting.
- I know what the desired outcomes are before I arrive.
- I and everyone who needs to attend have been told.
- I received an agenda 2 to 3 days before I came to the meeting

Preparation Stage

- Enough time was allotted to address agenda items.
- The purpose of the meeting was stated clearly at the beginning of the meeting.
- At the beginning of the meeting, everyone agreed on what he or she would like to see come out of the meeting.
- Everyone had a chance to modify the agenda and agree on priorities and time allocations.

Participant Stage

- We adhered to the agenda unless everyone agreed to modify it.
- We did not allow ourselves to be diverted from attaining our agreed-upon outcomes.
- Everyone contributed his or her viewpoint on the issues discussed.
- We got agreement on action steps, responsibilities and target dates for completion.
- We summarized our meeting.
- We recorded all decisions.
- We recorded the names of persons responsible for action steps and the target date for completion.

Post-Meeting Follow-up

- We evaluated our meeting and agreed on ways to improve our next meeting.
- We designated someone to edit and distribute the summary of the meeting.
- We put unfinished business on the next meeting’s agenda.
- We will regularly monitor and evaluate the eventual results achieved by our group.
Here are some suggestions that can make your meeting run more smoothly.

1. Stick to the agenda.
2. Use the roles of leader, scribe and timekeeper.
3. Start and end on time.
4. Establish ground rules.
5. Encourage full participation.
6. Use visual aids.
7. Summarize and test for consensus.
8. Prepare an agenda for the next meeting before closing.
9. Check for suggestions for making future meetings more effective.

To make sure that you will get the most from your meeting, ask yourself the following questions as you make your arrangements:

1. Will a meeting actually be useful and helpful in this case?
2. Are the right people going to be attending?
3. Has a clear agenda been prepared and distributed ahead of time?
4. Do you have all the supporting materials and supplies (i.e. any facts and figures gathered in preparation, as well as markers, flipcharts, tape, etc.)?
5. Has everyone been informed of the meeting’s time and location?
6. Have participants carried out any assignments needed to prepare for the meeting?
Encourage Participation

Not everyone is comfortable participating in a meeting. It may be that they are unsure of their role or the value of their input. There are, however, some fairly simple ways of helping to assure full participation:

- **Make it Safe.** People won’t feel comfortable sharing their ideas if they feel they may face retribution or ridicule. Create an environment where everyone feels safe when contributing.
- **Create a “blame-free zone.”** Make sure that you are looking for ways of improving a process rather than assigning blame to a person or department. The focus should be positive, not negative.
- **Act as “gate keeper.”** Encourage equal participation by creating openings and asking for input.
- **Listen.** Truly listen. Listen carefully to the message and the feelings behind it. Explore ideas rather than debate or defend.
- **Contain digression.** Limit irrelevant discussion and unnecessarily long examples or stories.
- **End the discussion.** Make sure that all participants have the same impression of what has been said, helping to close and decide any necessary issues.
- **Test for agreement.** Summarize the group’s position and state any decisions. Check for agreement of the summary.

Visuals!

Displaying information visually helps in a few ways. First, it’s true, a picture is worth a thousand words. Using a graphic reinforces key concepts and ideas. Secondly, graphics of any kind help to break up the monotony of only hearing information presented verbally. In addition, a very large number of people learn most effectively and think most creatively when they work with visual things.

- Flipcharts
- White boards
- Graphs and charts
- PowerPoint, videos and DVDs
- Colored markers
- Combine a few different ways of presenting information!
SUGGESTED MEETING GROUND RULES

1) No sidebars

2) Listen completely

3) Allow each other to talk; don't shout out

4) Brainstorm with an open mind and without judgment

5) Think more broadly

6) Bring solutions as well as problems

7) Think inclusively and not departmentally

8) Be fully present, no cell phones, etc.

9) Model leadership—share responsibility for meeting success

Ground rules are written and posted agreements among meeting participants about how they will interact with each other. They are essential to productive and efficient meetings.
# Meeting Record Template

**Instructions:**

Take notes during the meeting on a page like this. Focus on capturing the main ideas associated with topics discussed. Summarize the discussion whenever possible.

<table>
<thead>
<tr>
<th>Agenda Item</th>
<th>Key Discussion Points</th>
<th>Outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Topic 1</td>
<td>Main Points</td>
<td>Decisions, Action Items</td>
</tr>
<tr>
<td>Topic 2</td>
<td>Main Points</td>
<td>Decisions, Action Items</td>
</tr>
<tr>
<td>Topic 3</td>
<td>Main Points</td>
<td>Decisions, Action Items</td>
</tr>
<tr>
<td>Topic 4</td>
<td>Main Points</td>
<td>Decisions, Action Items</td>
</tr>
</tbody>
</table>