



Planning and Conducting a Successful Meeting¹

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The first step in the meeting process is to decide whether or not you should even try to have a meeting.

Everybody who will attend the meeting (including you) has two opinions about meetings:

1. They hate them.
2. They feel that they attend far too many meetings.

In fact, the following are two well-known quotes that people have said about meetings:

"A meeting is a gathering where people speak and, say nothing, and all disagree."

"A meeting is a place where you keep the minutes... and throw away the hours."

If everyone hates meetings and everyone thinks that we attend too many, maybe you don't need to call a meeting. You could just circulate the information and make sure that everyone is kept up-to-date at all times.

Meetings do more than provide us with information.

The Meeting: Bore or Challenge?

Since so much of our time is spent in meetings, it makes sense to schedule and conduct meetings only when we have to.

The following are types of ineffective meetings:

- Ritual meetings-- meetings that are held to show off for the boss
- Meetings that are held to spread information (something done more effectively by phones, faxes or publications)
- Social meetings-- a place for people to get together and renew contacts or network
- Meetings that are held to prevent something that has been scheduled and approved
- Meetings designed to allow people to ventilate or get something off their chest

INEFFECTIVE meetings have the following characteristics:

- Subject matter is not relevant
- Meeting is too big

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- Meeting is dominated by one or more persons
- Meeting has no clear objective
- Meeting is too long
- No one seems to lead the meeting

EFFECTIVE meetings have the following characteristics:

- There is a common focus on one objective
- There is a common focus on how the objective can be met
- There is a 'recognized' leader who maintains an open and balanced conversation between participants, and who protects the rights of all members
- There is a clearly defined role for every person in the meeting and the leader recognizes those roles at appropriate times
- There is a well-planned structure to the meeting and it ends when everyone feels the meeting has been successful

The COSTS of Meetings

Meetings are expensive. Everyone at a meeting thinks that their time is worth something. Even if they aren't missing work to be there, they still feel like their time is valuable. If you act like their time is not important, they are going to save themselves the effort of attending your meeting.

What Should You Do?

When you have to conduct a meeting, you can save a lot of time and money later on if you plan your meeting.

Planning the structure of a group session: To plan a meeting that will be successful, you have to answer the following questions well before you try to conduct the meeting.

- What are the sessions purposes and desired outcomes?

- Is a group session necessary?
- Who should attend the session?
- What is the composition of the group?
- What is the agenda content and the logical flow?

Purpose

Before you can lead a group to discover the purpose of a meeting, you have to be absolutely sure that you know where you are going yourself. If you don't sit down and carefully write up your purpose, you might not know it when you achieve it. As a result, you would keep on conducting your meeting and the participants would think that it was a confusing and unnecessary meeting.

Is a Meeting Necessary?

The first thing you have to determine is why you want to call a meeting. Is it because it is a tradition to have that meeting? Is it because you want to give information to one person? Is it because you enjoy being the leader (manager's ego)? Is it so that the team can see itself as a team (team ego)? Go back and look at your purpose. If a meeting is absolutely necessary it will show in the purpose.

One thing is certain: if you establish a useful purpose and communicate it to the group, they will know that the meeting was not a waste of time when you accomplish your purpose.

How can you be certain of your purpose? Put it on paper! Write it down and then share it when you call the meeting.

A desired outcome will:

- Create common expectations in the group
- Provide focus
- Define the type session so you can conduct it

- Provide a benchmark to measure success and produce future success

Your meeting will score a bull's eye if it is aimed properly.

If you carefully and specifically write down the purpose of the meeting and share it in advance, everyone will know what they are doing and how they can accomplish it. In addition, everyone will know what to know and what to bring so that the meeting will be successful.

How can you put it in words? Write up your purpose using only verbs and subjects. For instance the following are verb-subject purposes:

Revise newsletter

Pick meeting date

Coordinate holidays

Using only verbs and subjects will lock out adjectives like favorite, important, or even more threatening: MY, MINE and YOU.

Alternatives to Meeting

If, after you establish your purpose, you decide that you don't need to share everything with everyone, you need to find some alternatives.

The following could be used instead of calling a meeting:

- Telephone calls... group calls?
- Memos
- Copy the material and mail everyone the part that they need to know.
- Maybe you can use someone's electronic mail?

But, suppose you have creatively looked at the alternatives and have decided that you can't think of an alternative to calling a meeting? You just might need to call a meeting! The following is a final checklist to help you determine whether you need a meeting. If you check the 'yes' blank on any ONE of the following questions, you definitely need a meeting:

- No one person has sufficient information to make a 'quality' decision.

Yes _____ No _____

- The idea will only work if everyone is committed to it.

Yes _____ No _____

- The topic is complex and it is critical that everyone have the same knowledge.

Yes _____ No _____

- Conflicting views have to be reconciled if people talk.

Yes _____ No _____

- People who are important to the 'purpose' are independent.

Yes _____ No _____

Who Should Attend?

There are two rules for successful group meetings:

1. Invite as few members as possible, and
2. Work hard to get everyone to agree as much as possible

Everyone at the meeting should come away with three ideas:

1. the meeting could not have been avoided,
2. the meeting was as short as it could be, and
3. I played an important part.

REMEMBER: THE MORE WHO ATTEND THE MEETING, THE LESS EACH PERSON CAN PARTICIPATE; AS A RESULT, LESS WILL PROBABLY GET DONE.

ATTENDEES include anyone who:

- possesses critical information
- has a stake in the outcome
- has responsibility for a part
- can prevent the purpose from occurring

What is the Agenda?

How can you get all these people with differing agendas to work together as a single unit? You need to establish an agenda for the meeting that will allow them to participate without having to leave out their other agendas.

What is an agenda? It's a blueprint for a meeting. It's like the checklist that a pilot uses before taking off. A preflight checklist finds problems BEFORE they occur. An agenda does the same.

An agenda is a thorough list of all the material that will be covered, with notes about who has specific information that will be helpful to the group's discussion.

Where should you start when you make an agenda? Past meetings? Each meeting has a different purpose. Suggestions from participants? Each person has a different agenda.

The agenda should be based on the 'purpose' of the meetings and it should allow the problem to be solved with the least amount of distraction from people involved and other problems that may be related or may be of interest to this group.

The agenda is the formula for the meetings success. You can't decide the agenda until you decide the purpose of your meeting.

Which Type of Meeting?

There are three basic types of meetings: the **problem/solution meeting**, the **information-sharing meeting** and the **learning meeting**.

Most of the meetings that we have attended in the past have been set up to look like Figure 1, with the 'x' being the meeting caller and the 'o's being the people we call together.

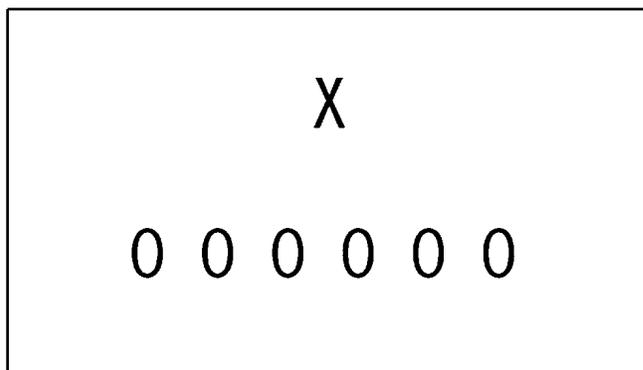


Figure 1. General meeting setup.

The truth of the matter is that this type of meeting pleases the person who called the meeting, but distances the people who should be participating. How can you get around this problem? Design a meeting format that meets your purpose and pulls the crowd together.

Problem/Solution

If your meeting is a problem/solution meeting, your group should be situated in a round-table type format. In the round-table format group members arrange themselves so that everyone has an equal chance of participating. Group interaction is informal and members contribute as they see fit. A leader or moderator is present but this person's role is to facilitate and not boss. A key aspect of the moderator's role is to make sure that everyone participates. For this type of meeting, the agenda is brief and open-ended. The purpose of this type of meeting is a thorough review of the subject, so time is not a critical factor (Figure 2).

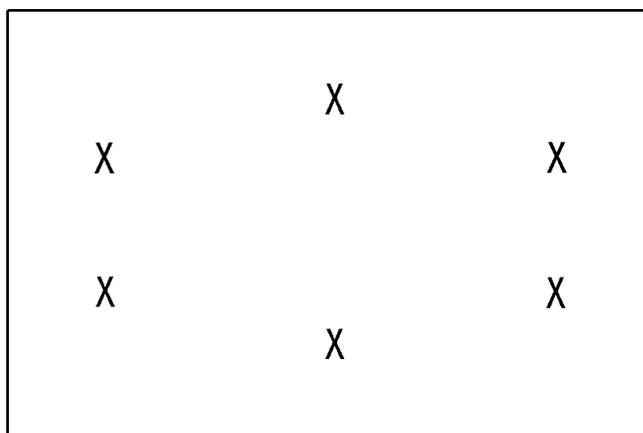


Figure 2. Problem/Solution Meeting Setup.

Information Sharing

If your meeting is an information sharing meeting, your group should be situated in a panel-type setup with a group of experts at a table and the audience in front of them (Figure 3). In the panel setup, the mood is informal and there is no set order that the speakers follow. The audience is involved, but the panel provides the expert information and the audience provides their reaction to the information.

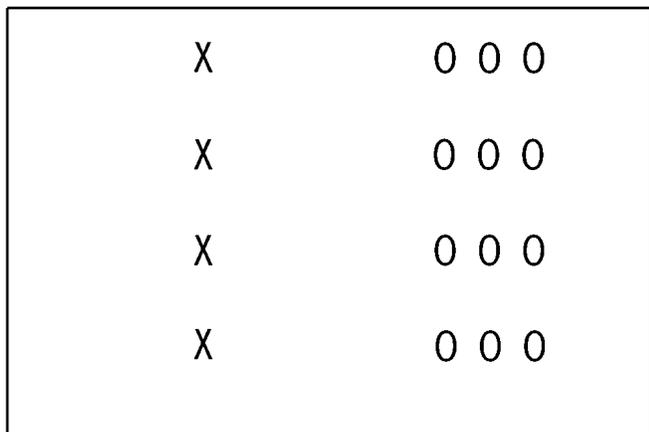


Figure 3. Information-sharing Meeting Setup.

The agenda for this meeting is informal and there is no need to impose time limits. Since the audience is participating, this meeting is slower and goes longer, but the audience prefers this setup to the lecture. In this type of meeting the moderator must keep things on track to prevent the meeting from being 'kidnapped' by audience or panel members.

Learning-Type Meeting

If your meeting is a learning-type meeting it would be set up in the symposium meeting format (Figure 4). In this format, a series of prepared statements is presented by a speaker or group of speakers. The agenda lists the role of each speaker and limits the amount of time for each.

In the this type of meeting, the moderator has starts the session, after which the speakers are allowed to make their presentations. The moderator introduces the speakers and provides transitions between speakers. In this type of meeting it is important that the meeting supervisor and the participants agree on the subjects and the time because once it is underway

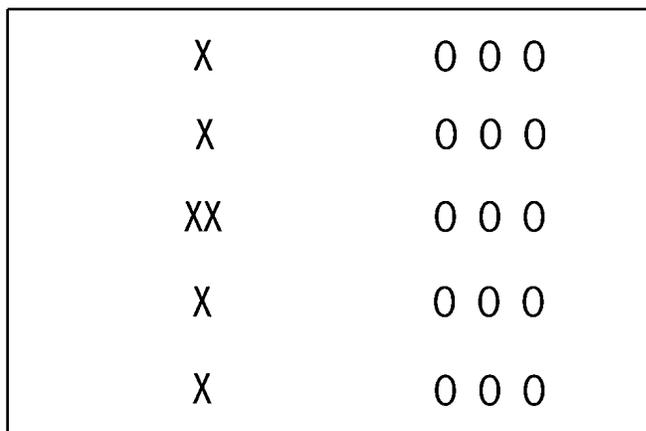


Figure 4. Learning-type Meeting Setup.

the audience and the moderator are at the mercy of the speakers.

Once you have decided on the type of meeting that you need to have, you are ready to make your agenda. To make your agenda, list all the possible subjects that can be covered and put them on a blackboard. Then, group the subjects by categories and link them so that they are in the logical order.

Depending on the type of meeting (problem/solution, information-sharing or learning) your agenda will be brief and loose (problem/solution) or complete and rigid (learning). There are many possible meetings, but each situation and group has only one BEST way to be run.

Successful Meetings

Successful meetings depend upon a whole range of variables--some physical, some mental. Obviously, a good meeting needs to occur in a room that promotes the right atmosphere.

The best meetings occur in places that are neither too formal nor too casual. A formal room inhibits relaxation so it also inhibits concentration. On the other hand, research shows that casual settings promote the kind of attitudes that are not good for detail work or persuasion. Formal rooms are usually too large and too well-lit.

Because of their size and the distance between participants, hearing will be more difficult in a large formal room.

On the other hand, if the room is too cramped, everyone will be jammed in with the furniture. A small room is dark and noisy and everyone will want to get out of it.

Successful meetings occur in rooms that comfortably hold people together, with enough light and space to let everyone focus on the issues at hand. Successful meetings have audio-visual materials and sound systems that are neither too complex nor too simple to allow everyone to see and understand what is happening.

Successful meetings also occur in rooms that are easy to access and don't expose the participants to unnecessary distractions.

If you don't have a choice, you will have to hold a meeting in poor conditions. It may also be necessary to reschedule. If possible, break it up into more personal space and use what you have more effectively and do everything in your power to find a better place for the next meeting.

Focusing the Meeting

Having a well-written agenda and holding the meeting in a room that is perfect for the type of meeting and the size.

How can the leader focus the meeting and ensure success? The leader could use the following ten meeting commandments whenever possible:

1. Always start the meeting on time,
2. Make everyone feel that they are a necessary part of the process,
3. Use visuals whenever possible,
4. Encourage people to participate when they can add something to what is being resolved,
5. Summarize frequently and keep a visual record to show progress,

6. Restate important points and condense ideas into short statements
7. Get group support for good ideas,
8. Indicate action that is needed,
9. Protect the rights of the members, and
10. Always end on time.

Making a Presentation

At various times in your business and social life you will be called upon to present your views. The following are general rules that will help you.

The Persuader

The audience will be more likely to agree with you if establish your credibility. To increase your credibility, stress two factors:

1. your **Expertise** (what you know), and
2. your **Trustworthiness** (your honesty).

Your effectiveness will be increased if you agree at first with the audience.

What the audience thinks of **you** is directly influenced by what they think of the message. If you suspect they will have a low opinion of the message, withhold the message to build their trust.

Presenting the Issues

- Present one side of the argument when the audience is friendly, or when your position is the only one that will be presented.
- Present both sides of the argument when the audience disagrees with you, or when the audience will hear the other side.
- When opposite views are presented one after another, the one presented last will probably be more effective.

The Audience as Individuals

- The people you may want most in your audience are often least likely to be there (selective exposure). Use a second communication source to increase your influence.
- Individuals who are easy to persuade will also be easy to dissuade. They must be persuaded more than once.

The Influence of Groups

- You can't just sell the individual. A person's opinions and attitudes are strongly influenced by the groups they belong to.
- Audience participation (group discussion and decision-making) helps get people to agree.

References

Thomas Kayser, "Mining Group Gold," 1990, Serif Publishing, El Segundo, California.

Philip Zimbardo and Ebbe Ebbesen, "Influencing Attitudes and Changing Behavior," Addison-Wesley Publishing Company, Reading, Massachusetts, 1970.

Successful Meeting Checklist

- Did the meeting show careful planning?
Yes _____ No _____
- Did the right people attend?
Yes _____ No _____
- Was the leader prepared for the meeting?
Yes _____ No _____
- Were all the materials and equipment ready?
Yes _____ No _____
- Was the seating, ventilation and lighting adequate?
Yes _____ No _____
- Did the meeting start on time?

Yes _____ No _____

Was the group welcomed and comfortable?

Yes _____ No _____

Was the objective clearly defined?

Yes _____ No _____

Was the group interested in the subject?

Yes _____ No _____

Were the facts clearly presented?

Yes _____ No _____

Was the leader in charge?

Yes _____ No _____

Did the leader keep the meeting moving?

Yes _____ No _____

Did the leader involve EVERYONE?

Yes _____ No _____

Did the leader use visuals (blackboard, notepads, or slides) to clarify?

Yes _____ No _____

Was the leader fair to everyone?

Yes _____ No _____

Did the leader help the group to make decisions?

Yes _____ No _____

Did the group agree?

Yes _____ No _____

Were the decisions summarized at the end?

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Yes _____ No _____

Were the objectives met?

Yes _____ No _____

Did the meeting end on time?

Yes _____ No _____