# REPRODUCIBLE TRAINING LIBRARY
## Customizable Soft-Skills Courseware

# Meeting Management

Instructor Guide

# 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.

# Contents

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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

# Chapter One



# *PREPARING YOURSELF AND OTHERS*

Effective meetings
• Clear results
• Efficient use of people's time
• Equal participation
• 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?

◊

◊

◊

◊

# 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!

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

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.

As a facilitator, you'll need to determine the level of intervention you need to provide in these situations. Depending on the offender and the circumstances, the intervention may range from a casual, off-hand remark to a more specific request or even a direct order.



For side conversations, you can either be direct or subtle. A direct comment would be, "Do you have anything to share with the group?" If they don't, ask them to save their conversation until after the meeting. If they do have something to share, ask them to wait until the person has finished speaking to share their comments. A more subtle approach would be to ask the chatting person a question like, "Alex, what do you think of Cynthia's last point?" Finally, you can speak to the offender outside the meeting and explain how much of a distraction their side conversations are.

Activity: Practice facilitation skills. Divide participants into groups of four to five and assign facilitator and prompter roles. Tell each group to choose a topic (either something related to their work or something generic like where to go for lunch).

Tell the other members of the group to try to take the discussion off track, or demonstrate some of the characteristics of a difficult type (encourage them to be realistic and not outrageous). The facilitator will practice using strategies just discussed (along with the help of the prompter, if some members break the ground rules established earlier). Debrief.

# Minimize domination by any single person or group

◊ Interrupt with grace
◊ State the need to hear from all participants at the meeting
◊ Summarize rambling remarks, and transition to a new person or topic
◊ If your meetings tend to be dominated by a few people, try passing out five pennies to each meeting attendee. Attendees must "spend" a penny each time they talk. And no borrowing allowed!
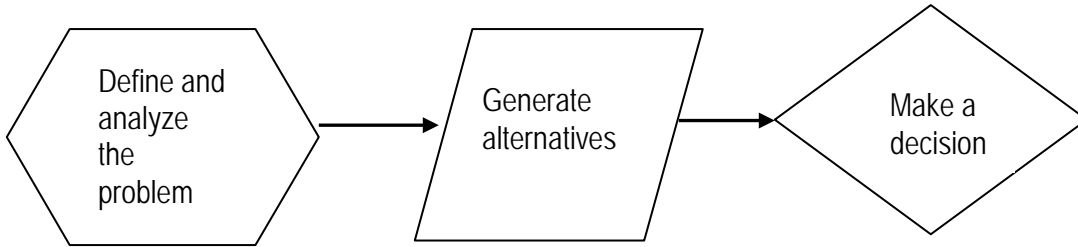
"Thank you for your comments, Julie. Let's hear from the rest of the group now."
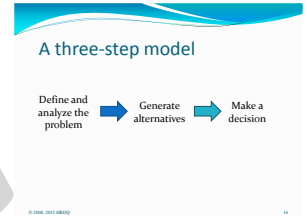
# Coping with difficult types

◊ Windbags
  – Acknowledge, and quickly move on
  – Cut them off in the interest of time
  – Suggest they follow up with you during a break
◊ Know-it-alls
  – Recognize their expertise; get them on your side
  – Involve them in a task requiring follow-up
  – Acknowledge they made a good point, but that others may differ
◊ Naysayers
  – Challenge negativity before it bogs things down or brings things to a grinding halt
  – Ask him or her to suggest a better idea
  – Take initiative in offering positive viewpoint

"Now that you've let us know what you don't like about the idea, tell us what you do like about the concept."

# A three-step model

```
┌─────────────┐      ┌─────────────┐      ┌─────────────┐
│ Define and  │      │             │      │             │
│ analyze     │─────▶│ Generate    │─────▶│ Make a      │
│ the         │      │ alternatives│      │ decision    │
│ problem     │      │             │      │             │
└─────────────┘      └─────────────┘      └─────────────┘
```

## Step 1: Define and analyze the problem

*List a problem you've encountered during a recent meeting:*

_____

_____

_____

_____

_____

*Relationship diagrams*

◊ Write a short statement of an issue or a problem and post the statement on a wall.

◊ Give each person some cards, and ask them to identify the factors that affect the issue or the problem, writing one idea per card (large enough so they are easy to read).

◊ Move the cards around so the factors that are related to each other are located together.

◊ Analyze the relationships.

  – Use colored tape or strings to show cause-effect relationships.

  – Those cards that are most often seen as being a cause (have the most tape or strings attached) are more likely to be the root cause of your problem.

Ask for examples of problems participants have encountered during a recent meeting. Make a list of those on a flip chart, and tell the group you'll be modeling the three-step process shown here to facilitate problem solving and decision making.
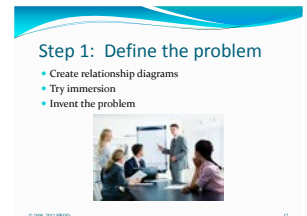
Problems can take different shapes: They may appear as a question, an undesirable situation, a dilemma, or a conflict.

Activity: Choose one topic from the list, and use that to demonstrate the steps of the model.

The biggest problem with the first step is getting people to do it. Groups often skip over this part and move straight to solutions (especially ones they already know how to do). The drawback is that the group may develop a great solution to the wrong problem, or the group may find a solution that addresses only the symptom and not the true cause or fundamental issues.

# Step 2:  Generate alternatives

## *Key issues*

◊ Suspend judgmental thinking.

◊ Avoid reliance on traditional ways of thinking about the issue.

◊ Separate ideas from the people.

## *Brainstorming guidelines*

◊ Insist on a large quantity of ideas.

◊ Encourage wild and crazy ideas.

◊ Allow plenty of time.

◊ Learn from, but don't lean on, past experience.

◊ Seek ideas from outside the group.

◊ Keep a record of all ideas.

## *Value multiple points of view*

◊ How would the customer view the problem?

◊ How would an outsider view the problem?

◊ How would a doctor view the problem?  A firefighter?  A police officer?  A gardener?  A teacher?

## *Use analogies*

◊ Identify options by working through several analogies.

– "If our organization was a biological system, the way we'd solve this problem would be...."

– "If it were a virus, we'd...."

## *Create fantasy solutions*

◊ Ignore all rules and "givens," including physical laws such as gravity or market realities.

– "We'd all communicate using ESP, and then we wouldn't need..."

◊ After several fantasies, talk about ways you could solve the problem in a similar manner while addressing physical or market realities, e.g., use cell phones instead of ESP.
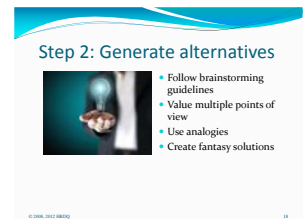


Key issues: People should not support or oppose ideas based simply on who suggested them.

Brainstorming: Don't allow evaluative comments,even positive ones, until the process is complete.

Value multiple points of view: This is a very helpful way to challenge current thinking and assumptions—to think outside the box.

Use analogies: Analogies can be very powerful for finding unexpected connections.  Try to draw pictures with your analogies to stimulate even more creative thinking.

Fantasy solutions can ignore all practical thinking—all market realities; even the laws of physics.

Activity: Again, use one or several of the options given to generate alternatives for the problem the group has identified.
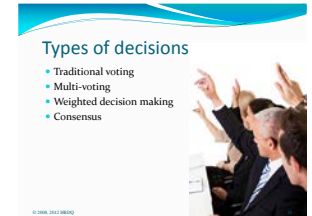
# Choose a decision-making process

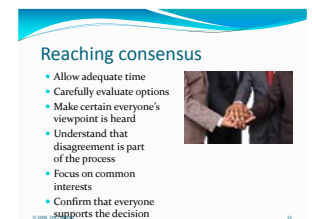| Type of decision | Description | Strengths | Weaknesses |
|---|---|---|---|
| Traditional voting | Majority rules | Fast | Can polarize the group |
| Multi-voting | Work through several rounds of voting; eliminate the item with the least number of votes from each round | Helps narrow choices without alienating parts of the group | Doesn't necessarily achieve total agreement |
| Weighted decision making | Assign a weight factor between one and ten for each option. Vote on each item, and multiply its score by its weight factor | Appeals to logical, systematic types | Might feel too rigid for more intuitive types |
| Consensus | Reaching a conclusion that the entire group supports without voting | Ensures true agreement | Slow |

# How to reach consensus

◊ Allow adequate time.
◊ Evaluate options rather than using majority voting or flipping coins.
◊ Make certain everyone's viewpoint is heard.
◊ Understand that disagreement is part of the process.
  – Support/defend individual judgments
  – Maintain an atmosphere of trust and respect
◊ Help the group integrate positions by focusing on common interests.
◊ Confirm that every participant supports the decision.
  – Support means live with and not sabotage it
  – Observe body language

Ask participants if they ever take meeting notes and then do nothing with them. Some experts estimate that up to 80% of professionals end up with unprocessed meeting notes tucked away in notebooks, folders, drawers, and PDAs.

### Writing minutes that get read

Answer these questions:

- What happened?
- What needs to happen next, based on the meeting?
- Who's doing it?
- What is the deadline?
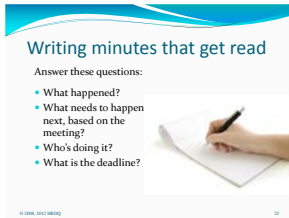
Minutes are needed to capture essential information—decisions and action items. But they don't need to record everything exactly as it happened.

You can toss your original meeting notes once you're confident you've addressed every item from the meeting. Other people prefer to keep their original notes as a reference or backup.

Using a template for recording information helps streamline the process and ensure that you capture all pertinent information.

# Meeting minutes

Do your fingers cramp up at the thought of recording meeting minutes? Or do your eyes glaze over at the thought of reading them? These tips will ensure that your meeting minutes capture essential information and keep everyone on track.

◊ Use a template
  – Gather as much information as possible ahead of time.
  – Don't record conversations verbatim.
  – Focus on decisions and action items, not discussion.
◊ Questions to answer:
  – What needs to happen now, based on the meeting?
  – Who's doing it?
  – What is the deadline?
◊ Categories of information
  – Decisions
  – Assigned action items
  – Updates/debriefs
  – Items needed for future reference
◊ Process and distribute within 48 hours of meeting
  – Make sure your notes stay at the top of your to-do pile.
  – Use a check-off system or some other means of visually indicating that an item has been reviewed and processed.
  – Store original notes until the next meeting, then keep or toss.

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### Tips to improve your writing

◊ Be objective: Avoid personal observations. The fewer adjectives and adverbs you use, the better.
◊ Project a business tone: Write in the same tense throughout the document and avoid using people's names except for motions or seconds.

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# Course review

1. List four outcomes of a successful meeting.

   _____
   _____
   _____
   _____

2. The role of the prompter is to:

   a. Help the group remember important items
   b. Help the group stick to its ground rules
   c. Guide the meeting
   d. Keep track of time

3. List three typical ground rules.

   _____
   _____
   _____

4. A "parking lot" is used to curb participants who are talking too much.

   a. True
   b. False

5. Which of the following is NOT a strategy for controlling know-it-alls?

   a. Point out what they don't know
   b. Acknowledge their expertise
   c. Involve them in a task requiring follow-up
   d. Admit when they make a good point

6. List three ways to overcome groupthink.

   _____
   _____
   _____

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