

**Meeting Management**

**Instructor Guide**

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# Preface

*Learning is a treasure that will follow its owner everywhere.*

***Chinese Proverb***

## What is Courseware?

MC900071138[1]Welcome to Courseware.com, a completely new training experience!

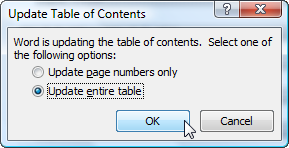
Our courseware packages offer you top-quality training materials that are customizable, user-friendly, educational, and fun. We provide your materials, materials for the student, PowerPoint slides, and a take-home reference sheet for the student. You simply need to prepare and train!

Best of all, our courseware packages are created in Microsoft Office and can be opened using any version of Word and PowerPoint. (Most other word processing and presentation programs support these formats, too.) This means that you can customize the content, add your logo, change the color scheme, and easily print and e-mail training materials.

## How Do I Customize My Course?

Customizing your course is easy. To edit text, just click and type as you would with any document. This is particularly convenient if you want to add customized statistics for your region, special examples for your participants’ industry, or additional information. You can, of course, also use all of your word processor’s other features, including text formatting and editing tools (such as cutting and pasting).

To remove modules, simply select the text and press Delete on your keyboard. Then, navigate to the Table of Contents, right-click, and click Update Field. You may see a dialog box; if so, click “Update entire table” and press OK.

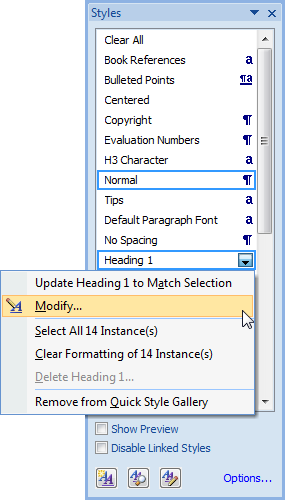


(You will also want to perform this step if you add modules or move them around.)

If you want to change the way text looks, you can format any piece of text any way you want. However, to make it easy, we have used styles so that you can update all the text at once.

If you are using Word 97 to 2003, start by clicking the Format menu followed by Styles and Formatting. In Word 2007 and 2010 under the Home tab, right-click on your chosen style and click Modify. That will then produce the Modify Style options window where you can set your preferred style options.

For example, if we wanted to change our Heading 1 style, used for Module Titles, this is what we would do:



Now, we can change our formatting and it will apply to all the headings in the document.

For more information on making Word work for you, please refer to Word 2007 or 2010 Essentials by Courseware.com.

## Materials Required

All of our courses use flip chart paper and markers extensively. (If you prefer, you can use a whiteboard or chalkboard instead.)

We recommend that each participant have a copy of the Training Manual, and that you review each module before training to ensure you have any special materials required. Worksheets and handouts are included within a separate activities folder and can be reproduced and used where indicated. If you would like to save paper, these worksheets are easily transferrable to a flip chart paper format, instead of having individual worksheets.

We recommend these additional materials for all workshops:

* Laptop with projector, for PowerPoint slides
* Quick Reference Sheets for students to take home
* Timer or watch (separate from your laptop)
* Masking tape
* Blank paper

## Maximizing Your Training Power

We have just one more thing for you before you get started. Our company is built for trainers, by trainers, so we thought we would share some of our tips with you, to help you create an engaging, unforgettable experience for your participants.

* **Make it customized.** By tailoring each course to your participants, you will find that your results will increase a thousand-fold.
* Use examples, case studies, and stories that are relevant to the group.
* Identify whether your participants are strangers or whether they work together. Tailor your approach appropriately.
* Different people learn in different ways, so use different types of activities to balance it all out. (For example, some people learn by reading, while others learn by talking about it, while still others need a hands-on approach. For more information, we suggest Experiential Learning by David Kolb.)
* **Make it fun and interactive.** Most people do not enjoy sitting and listening to someone else talk for hours at a time. Make use of the tips in this book and your own experience to keep your participants engaged. Mix up the activities to include individual work, small group work, large group discussions, and mini-lectures.
* **Make it relevant.** Participants are much more receptive to learning if they understand why they are learning it and how they can apply it in their daily lives. Most importantly, they want to know how it will benefit them and make their lives easier. Take every opportunity to tie what you are teaching back to real life.
* **Keep an open mind.** Many trainers find that they learn something each time they teach a workshop. If you go into a training session with that attitude, you will find that there can be an amazing two-way flow of information between the trainer and trainees. Enjoy it, learn from it, and make the most of it in your workshops.

And now, time for the training!

# Module One: Getting Started

*Meetings without an agenda are like a restaurant without a menu.*

***Susan B. Wilson***

Welcome to the Meeting Management workshop. You are on your first project and you have to organize and manage the project kick-off meeting. What do you do first? Do you create the agenda or the invitation list? How do you run a meeting? What preparation do you need? All of these are valid and real questions you, as the meeting manager, must address. There is no doubt about it. Meetings require skill and technique in order for the meeting to achieve its purpose. Disorganized and poorly managed meetings waste time and hurt your credibility as a meeting manager. Consistently leaving a poor impression with the attendees will haunt you if left unchecked.

This training course is designed to give you the basic tools you need to initiate and manage your meetings. You will learn planning and leading techniques that will give you the confidence to run a meeting that will engage your attendees and leave a positive and lasting impression. This is a hands-on workshop and your participation will help make it a valuable experience. Use this time to begin the process of developing your skills along with other participants who share the same desire to improve their meeting management skills.

Before we begin, let’s get to know each other better. Since we will be spending most of today working with each other, it is worth the time to share some things about ourselves now, making it easier to engage in the course.

## Housekeeping Items

Take a few moments to cover basic housekeeping items.

* If you need an opening or a way to introduce the participants to each other, utilize the Icebreakers folder to begin or between breaks during the day.
* Let participants know where they can find washrooms, break facilities, and fire exits.
* Ask participants to turn off their cell phones or at least turn them to vibrate. If they must take a call, request that they do it outside.
* Take this time to encourage the group to ask questions and make this an interactive workshop.
* Write the words Respect, Confidentiality, and Practice on a piece of flip chart paper and tape it to the wall. Explain to participants that in order to get the most out of this workshop, we must all work together, listen to each other, explore new ideas, and make mistakes. After all, that’s how we learn!

## C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\MP321RS9\MC900057299[1].wmfThe Parking Lot

Explain the concept of The Parking Lot to participants.

* The Parking Lot is a visible place where you will “park” ideas that arise which are not on the agenda, may be off topic, or are better addressed outside of the program.
* At the end of the session, we will review parked ideas and follow up, or make suggestions for your own investigation when you are back at work.

Suggestions for the trainer:

1. If you are working with a large group of participants, you may wish to nominate a recorder to park items as you are facilitating.
2. It’s a good idea to note the name of the contributor along with the parked item.
3. Items noted on the parking lot can be useful to you later as you plan future training sessions.

## Workshop Objectives

C:\Users\Kimmi\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\JVU559D0\MCj02934740000[1].wmfResearch has consistently demonstrated that when clear goals are associated with learning, it occurs more easily and rapidly.

By the end of this workshop, participants will:

* Planning and Preparing
* Identifying the Participants
* How to choose the time and place
* How to create the agenda
* How to set up the meeting space
* How to incorporate your electronic options
* Meeting Roles and Responsibilities
* Use an agenda
* Chairing a Meeting
* How to deal with disruptions
* How to professionally deal with personality conflicts
* How to take minutes
* How to make the most of your meeting using games, activities and prizes

## Pre-Assignment Review

Description: Description: C:\Program Files\Microsoft Office\MEDIA\CAGCAT10\j0234131.wmfThe purpose of the Pre-Assignment is to get participants thinking about their current set of Meeting Management skills. You will also find a Pre-Assignment handout in the Activities folder.

How important do you feel an agenda is? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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How long is too long for a meeting? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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## Action Plans and Evaluations

Pass out the participant action plans and evaluations, available in the activities folder. Ask participants to fill these out throughout the day as they learn new things and have ideas on how to incorporate the things we discuss into their lives.

# Module Two: Planning and Preparing (I)

*There are two ways of meeting difficulties: You alter the difficulties or you alter yourself to meet them.*

***Phyllis Bottome***

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\OVV8IZ9R\MC900436996[1].wmfThe first step in making your meeting effective begins with your planning and preparation activity. Determining the purpose of your meeting, the people who should attend, and the place of the meeting will form the foundation on which you will build your agenda, decide what materials you need, and identify the roles each attendee hold in the meeting. In addition, planning and preparing for your meeting helps to reduce the stress that may result from managing a meeting, because you will avoid unexpected incidents and issues that could derail your meeting.

This module is part one of your planning session, which focuses on important factors that could affect the success of your meeting. These factors are the people, place, and purpose of the meeting. Let us take a closer look to see how we can organize this to your success.

## Identifying the Participants

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\ZKNEI80I\MC900090342[1].wmfDetermining your meeting participants is an important planning step. You should not approach this casually. Who attends your meeting could help or hinder the meeting dynamics. There is a tendency to invite everyone you know in an effort to cover all angles. This is overkill. Before you think about whom to invite, think about the purpose of the meeting. This will help you determine who should be invited. Be specific when determining the purpose of the meeting. For example, if you are meeting to resolve a problem, invite only those who are capable of providing solutions to the problem. Avoid inviting a high-ranking manager, who could thwart solutions before they are developed.

On the other hand, if your meeting is to come to a decision on a policy or product, do not invite people who do not have the power to enact those changes. Having people who cannot contribute to the meeting will exclude them and affect the meeting environment. Identifying the purpose of your meeting first will help to determine who should attend. Here are some common reasons to call a meeting:

* Problem solving
* Decision making
* Conflict resolution
* Project initiation
* Planning
* Brainstorming

Once you determine your meeting purpose, you can list all the names of the participants you wish to attend. Once this list is created, then determine what each participant will contribute to the meeting. If a participant is deemed a non-contributor, they should be removed from the list. When all non-contributors are removed, you should have a good list of participants for your meeting.

|  |  |
| --- | --- |
| **Estimated Time** | 15 minutes |
| **Topic Objective** | Participants will learn how to determine who should attend the meeting. |
| **Topic Summary** | Identifying the right participants for your meeting is essential to the meeting dynamics. |
| **Materials Required** | Worksheet: Meeting Participants |
| **Planning Checklist** | Have enough worksheets for all participants |
| **Recommended Activity** | * Form groups of 4 to 5 participants * Have group leader * Distribute worksheet to all participants * Tell participants that they are going to plan for a meeting * Have participants individually determine who in their organization should attend their meeting based on the information on the worksheet * Allow 2-3 minutes * Have each participant share the reasons why the selected these people with their group * Have table leader jot down reasons shared by their tablemates * Have table leader share their table’s reasons with the entire class * Ask, “What thoughts would you like to share about using this worksheet?” |
| **Stories to Share** | None |
| **Delivery Tips** | None |
| **Review Questions** | Q: What challenges do you encounter when determining who should attend your meeting?  A: Answers my vary |

## Choosing the Time and Place

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\39XQYYJK\MC900370214[1].wmfThere are several considerations you must address when planning the time and place of your meeting. For instance, the time of day is essential if your meeting is meant to be a brainstorming session or problem-solving meeting. Setting these types of meetings right after lunch or late in the day could be a frustrating experience. Humans after lunch are usually lethargic and meetings at the end of the day are plagued with participants looking at the clock in anticipation to leave work and go home.

Meetings that require energy and high level of participation are best scheduled between 8 and 9 AM in the morning. Most workers are not engaged in their daily work yet so you will have their attention and energy for use in your meeting. The next best time for a meeting is around 3 PM. This gives your participants enough time to recuperate from their lunchtime meal. It also gives you at least an hour of cushion before your participants start thinking about going home. Meetings that are low key could be scheduled anytime during the day. Just remember not to schedule them to close to lunch or the end of the workday.

The location is also important to your meeting dynamics. Try to schedule your meeting in a well-lit spacious room. If you can get a room with windows, do so. Dark and cramped rooms will bog down your meeting. Some people get claustrophobic and are distracted by their surroundings. A couple of other things to consider are the need for privacy or if you intend to have an outside visitor attend. If the meeting topic is of a sensitive nature, then getting a room with more privacy will make participants more comfortable to discuss the issue. Furthermore, if you plan to have an outside visitor attend your meeting, get a room that is closes to the main entrance. This way your visitor does not have to search the halls of your organization in search of your meeting.

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| **Estimated Time** | 15 minutes |
| **Topic Objective** | Participants will learn to strategically select the best time and place for their meeting. |
| **Topic Summary** | The time and the place of your meeting could help your meeting be more successful. |
| **Materials Required** | Worksheet: Meeting Time & Place |
| **Planning Checklist** | Have enough worksheets available for all participants |
| **Recommended Activity** | * Distribute worksheet * Tell participants to use the worksheet to determine the time and place of their meeting planned in the last activity * Allow 2-3 minutes * Ask for volunteers to share the time and place they selected for their meeting * Go around the room several times   Facilitator Note: Avoid correcting those participants that may choose a poor time or place. During activity, monitor room for those who are struggling. Ask questions about their workplace and gather ideas on the best places to hold a meeting based on the type of participants. |
| **Stories to Share** | None |
| **Delivery Tips** | None |
| **Review Questions** | Q: Why is the time and place of your meeting so important that it should be planned?  A: The time and place could affect the energy level of the meeting. |

## Creating the Agenda

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\FZCJR17Y\MC900412642[1].wmfCreating the agenda can be easy if you know what to do in advance. The **SOAP** technique helps to collect the topics, organize them, and select the ones that will contribute the most to your meeting.

* **Seek topics from your participants**: send an email to the list of participants you created, asking for agenda topics. Give a brief explanation of the purpose of the meeting and an idea of what you are looking for in terms of topics. Do not make this the formal invitation. When you make the request, make sure you ask the participants for the time they need to discuss their topic, and provide a deadline to get their topic to you so it can be included on the agenda.
* **Organize topics into a list:** once you receive the topics, organize them into a list along with the time and the name of the presenter. This will give you the ability to scan through the list, narrowing it down to the topics you will select for the agenda.
* **Assess which topics are relevant to the meeting purpose**: with your list organized, determine which topics are the most relevant to the purpose of the meeting. Scratch out those topics you do not intend to use.
* **Pick the number of relevant topics that will fit into your meeting time:** review the time of the remaining topics. Select the enough topics to fill the time of your meeting minus ten minutes. Give yourself ten minutes for meeting overrun. If you go over, you will end on time. If you do not, then you get to adjourn your meeting early, making everyone happy.

Remember to contact the presenter that had their topic removed from the agenda, explaining the reason why it was not put on the agenda and recommending that topic be saved for another meeting.

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| **Estimated Time** | 15 minutes |
| **Topic Objective** | Participants will learn how to create an agenda using SOAP technique. |
| **Topic Summary** | SOAP stands for the following steps:   * Seek topics from your participants * Organize them into a list * Assess which topics are relevant to the meeting purpose * Pick the number of relevant topics that will fit into your meeting time |
| **Materials Required** | SOAP Job Aid, Worksheet: Agenda Template, Worksheet: List of topics |
| **Planning Checklist** | Prepare enough job aids, templates and topic lists for all participants |
| **Recommended Activity** | * Distribute job aid, template and list of topics * Have participants work in pairs * Have participants determine which topics belong on the agenda by using the SOAP job aid * Allow seven minutes to complete * Have participants voluntarily share their agenda with the class * Ask, “What thoughts can you share about using the SOAP technique?”   Facilitator Note: During the activity, walk around the room and help those who are having trouble with the job aid and template. Remember not to directly criticize a participant whose agenda list contains unrelated topics. Instead, have another participant share and reinforce them if it is correct. |
| **Stories to Share** | None |
| **Delivery Tips** | None |
| **Review Questions** | Q: Why should we consider the agenda the most important document at your meeting?  A: It communicates information; it is an outline, it serves as a checklist, and it gives focus to meeting. |

## Case Study

Caroline met with Gretchen to discuss her workshop’s learning objectives. When they had come to the end of the meeting, Caroline said, “Gretchen, I wanted to tell you something that I noticed at your last workshop.”

Gretchen said, “Sure, Caroline. What is it?”

“I noticed that a lot of your learning objectives appealed to the divergers, accommodators, and assimilators of the group. However, I want to make sure that we are mindful of the convergers.”

Gretchen nodded. “I have a lot of group activities where many answers are possible. That might be difficult for them, since there is more than one answer.”

“Right,” Caroline said. “However, the convergers will be great at identifying a single problem and finding a solution to that problem. We can be aware of this throughout the training.”

Gretchen kept all four learning types in mind as she gave the workshop.

## Module Two: Review Questions

1. Who should you invite to meetings?
   1. High-ranking managers
   2. All the interested employees
   3. People compatible with meeting’s purpose
   4. Everybody, in order to explore all the options
2. Which of the following is not an occasion for a meeting?
   1. Brainstorming
   2. Project initiation
   3. Planning
   4. All of the above are occasions for a meeting
3. Meetings that require energy and high level of participation are best scheduled:
   1. Between 8 and 9 am
   2. Between 10 – 12 am
   3. Between noon and 2 pm
   4. After lunch
4. Which of the following is not an important factor when it comes to place of the meeting?
   1. Light
   2. Size
   3. Windows
   4. All of the above are important factors
5. What’s the best way to organize topics?
   1. Simple list
   2. Chart
   3. Multimedia presentation
   4. Mind map
6. What is the name of the technique used for organizing the topics?
   1. SPONGE
   2. SOAP
   3. BRUSH
   4. FOAM
7. What’s the most secure way to make sure you won’t overrun the time of the meeting?
   1. Giving up a topic or two if you realize you will overrun the time
   2. Choosing topics that will fill the time of the meeting and adding extra 10 minutes
   3. ‘Compressing’ the topics
   4. Talking fast
8. What’s the most important factor when you need to pick the topics?
   1. Their complexity
   2. Their compatibility with participants
   3. Their relevancy
   4. Their expected results

# Module Three: Planning and Preparing (II)

*Management is efficiency in climbing the ladder of success; leadership determines whether the ladder is leaning against the right wall.*

***Stephen R. Covey***

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\MP321RS9\MC900237767[1].wmfThe last module dealt with the participant planning aspect of your meeting. In this module, you will learn how to gather the things you need to help facilitate the meeting more effectively. In addition, you will learn how to structure your invitation so you can communicate your meeting in a way that is consistent and sets expectations. Finally, you will understand the importance of making the logistical arrangements in advance, avoiding any last minute mishaps.

## Gathering Materials

Each meeting you hold will require both basic and special materials. Your job as the meeting manager is to determine what you need and acquire them in advance, avoiding last minute surprises.

The **SHOWS** acronym stands for stationary, handouts, organizer, writing tools, and special requests. Let us break down each letter so you get a better understanding of what this means.

* **Stationary:** this is all the paper you will need at the meeting. It includes, note pads, sticky notes, index cards, envelops, tape, paper clips, folders, and flip chart. Each meeting is different. You do not have to bring everything on this list. Determine what is going to take place at the meeting and materials needed for each activity or presentation. It is also wise to consult with the people on your agenda to see if they are going to facilitate activities that require stationary.
* **Handouts:** many times you or your presenters will need to distribute handouts. There could be a worksheet or an outline from an electronic presentation. In any case, you should consult with your presenters and acquire any handouts they may use. Determine if the handout they are giving you will be the most up-to-date version. If not, have them send it to you when they finalize it. Remember to set the expectation to have it a day or so in advance, giving you time to print and file it in your handout organizer.
* **Organizer:** when it is time to meet, the last thing you want to do is show up with a stack of handouts. Using an organizer like a portable accordion file or Pendaflex is an easy way to file your handouts and other stationary materials in one container. The filing system will allow you to file the documents in an orderly fashion, making distribution of the materials more professional. You want to avoid shuffling handouts around in front of your participants when it comes time to distribute them.
* **Writing tools:** this includes pens, markers, highlighters, and dry erase markers you may need for your meeting.
* **Special requests:** from time to time, your presenters may make a special request. An example could be a poster. Ask your presenters ahead of time for special requests.

|  |  |
| --- | --- |
| **Estimated Time** | 15 minutes |
| **Topic Objective** | Participants will learn how to use the SHOWS acronym to help gather the materials for their meeting. |
| **Topic Summary** | SHOWS focuses on the following:   * Stationary * Handouts * Organizer * Writing tools * Special requests |
| **Materials Required** | Handout: SHOWS |
| **Planning Checklist** | Have enough handouts for all participants |
| **Recommended Activity** | * Distribute handouts to all participants * Allow them 1-2 minutes to review * Encourage questions * Use discussion questions and discussion below to facilitate a conversation   Facilitator Note: Bring a sample accordion folder as a visual for your participants if possible. |
| **Stories to Share** | None |
| **Delivery Tips** | None |
| **Review Questions** | Q: What are some of the ways you determine the materials you will need for your meeting?  A: Answers will vary. |

## Sending Invitations

Many times invitations are sent without much thought. We figure the sending mechanism, whether it is Outlook or any other type of electronic program, will do the job effectively. It is wise to use an electronic tool for your invitation; however, there is more thought that should go into it. The three “P” approach gives a consistent and clear method of structuring your meeting invitation. Here is the breakdown:

* **Purpose:** the purpose of your meeting must be stated up front. It is not enough to put in the subject line: “Planning Session.” The vagueness of your purpose could result in low attendance. Be specific with your purpose. Instead of “Planning Session,” you could state, “Planning our budget for the first quarter.” In addition, you should attach your agenda, which gives more detail of the discussion topics.
* **Place and Time:** determine ahead of time where and when the meeting will take place. Avoid sending out invitations with a to-be-determine (TBD) message. The more effort you place on getting the details done in advance the more your attendees will take you seriously. In addition, provide clear instructions on the exact location.
* **Pact:** create a sense of binding agreement by setting expectations so you get the most responses as soon as possible with a level of commitment. For example, state, “Please respond to this invitation within 48 hours.” Also, set a cancellation policy by stating, “If you need to cancel, please call, or email me as soon as possible.” You could also include a statement that states, “Upon acceptance of this invitation, you are expected to attend.” Finally, you could also include a statement like this, “This meeting is a planning session, and your participation and idea-sharing will be greatly appreciated.”

Structuring your invitation with clear and concise information and expectations sends the message that you are seriously managing this meeting. You do not want to be famous for holding boring and inefficient meetings. This is something that takes a long time to correct.

|  |  |
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| **Estimated Time** | 15 minutes |
| **Topic Objective** | Participants will learn how to structure their invitation in a way that clearly communicates the purpose and your expectations of the participants. |
| **Topic Summary** | Using the three “P” approach helps to send the purpose, communicate the place and time and establish a pact with the participants. |
| **Materials Required** | Three ‘P’ Job Aid |
| **Planning Checklist** | Print enough job aids for all participants |
| **Recommended Activity** | • Distribute handouts to all participants  • Allow them 1-2 minutes to review  • Encourage questions  • Use discussion questions and discussion below to facilitate a conversation |
| **Stories to Share** | None |
| **Delivery Tips** | None |
| **Review Questions** | Q: What some of the ways each of the “P’s” could help you send an effective invitation?  A: Provides consistency in communication and sets clear expectations. |

## Making Logistical Arrangements

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\OVV8IZ9R\MC900363650[1].wmfThere are several areas where you should be planning the logistics.

* **Physical space:** consider the space in which you plan to hold your meeting.
  + Is it on site or off site?
  + Do you need to make reservations?
  + Does it need to be set up?
  + Do you have to contact you facilities department to remove or add partitions?
  + Do you need furniture moved?
* **Travel:** identify who will need to travel to your meeting.
  + Do they need travel arrangements?
  + Do they need transportation to and from the meeting location?
  + Do you have to make security aware of their presence so they are not held up at the door?
* **Food:** determine if you need to organize meals.
  + Is your meeting starting early in the morning and you need to serve a light breakfast?
  + Is your meeting all day?
  + Are you going to cater food?
  + Are you planning to have lunch at a local restaurant?
  + Do you need to make reservations?
* **Audio and visual:** later there will be a discussion on electronic options; however, if you plan to use electronics like a presentation or video.
  + Do you have to get this placed in the meeting room?
  + Are you savvy enough in troubleshooting technical problems or do you need a technical assistant?
  + Do you need a projector, screen, computer, etc.?
  + Do you need a sound system set up so everyone can hear the presenters?
* **Signage:** 
  + Do you need to get signs, posters, special handouts made up for your meeting?

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| **Estimated Time** | 10 minutes |
| **Topic Objective** | Participants will understand some of the logistics involved in planning a meeting. |
| **Topic Summary** | The following areas should be reviewed for logistics:  • Physical meeting space  • Travel  • Food  • Audio and visual  • Signage |
| **Materials Required** | Handout: Logistics |
| **Planning Checklist** | Prepare enough handouts for all participants |
| **Recommended Activity** | • Distribute handouts to all participants  • Allow them 1-2 minutes to review  • Use discussion questions and discussion below to facilitate a conversation |
| **Stories to Share** | None |
| **Delivery Tips** | None |
| **Review Questions** | Q: What are some logistics you need to manage?  A: Answers will vary. |

## Case Study

Greg and Kareem walked into a quiet office space to discuss the outcome of their last training. While they agreed that the training had seemed to go successfully, they wanted to evaluate how their participants applied the knowledge after the training.

Greg said, “Since we gave training on the soft topic of communication skills, it can be difficult to measure exactly how effective our training was for the participants.”

Kareem said, “Man, I’m glad we sat down before we gave the training to come up with a cohesive evaluation tool. Did you bring all the evaluation materials with you?”

“Yes,” Greg said, opening up the file. “As well as the pre-tests we gave at the training.”

Greg and Kareem looked over the design of their evaluation system once more, and then they used the tools they had to measure how much the participants learned.

## Module Three: Review Questions

1. What does the W in SHOWS technique stand for?
   1. Writing technique
   2. Writing tools
   3. Writing programs
   4. Writing invitations
2. What does the S in SHOWS technique stand for?
   1. Stationary
   2. Sticky notes
   3. Security papers
   4. Sketchy papers
3. Which of the following is not a part of the ‘three P’ approach?
   1. Place
   2. Purpose
   3. Participants
   4. Pact
4. In invitation, subject line has to be:
   1. Attractive
   2. Declamatory
   3. Specific
   4. High-flown
5. What is TBD message?
   1. To-be-determined
   2. To-be-dedicated
   3. To-be-done
   4. To-be-debated
6. Which of the following is not something you have to think about when it comes to physical space of the meeting?
   1. Reservations
   2. Moving furniture
   3. Is it in-site or off-site
   4. Plants and decorations
7. Which of the following is not a type of logistics you need to think about before the meeting?
   1. Food
   2. Signage
   3. Audio and visual
   4. All of the above are important
8. Which of the following is the least important thing when you have the attendants who travel to your meeting?
   1. Introducing them to the local customs
   2. Travel arrangements
   3. Informing security to let them into the building
   4. Taking care of their transportation

# Module Four: Setting up the Meeting Space

*Good management is the art of making problems so interesting and their solutions so constructive that everyone wants to get to work and deal with them.*

***Paul Hawken***

You are now ready to set up the meeting space. There are many things to consider that will determine what needs to be included in your set up. In the last module, you planned for the things you need. In this module, you are going to put it all together. Although this may seem like a trivial step, you should not take it for granted. The difference from an okay meeting to a remarkable meeting could be the small details. Let us begin with the basics.

## The Basic Essentials

Having a predefined list for setting up your meeting is a useful tool and we are going to discuss the setup of your meeting using a handout over the next three lessons. In the first section, you will see a simple list of items comprising of the basic essentials in setting up the meeting space. The list consists of the following items:

* Sufficient number of tables and chairs
* Power strips for laptops and other electronic devices
* Audio and visual set up
* Whiteboard with markers and eraser
* Lectern
* Water
* Verify the room temperature is comfortable
* Microphone for large meetings
* Projector
* Laptop
* Verify room is located in quiet and private area

Make sure you get to the meeting place early enough, giving you time to set up the room without the participants seeing you do it. Getting “caught” setting up the room gives the impression that you are unprepared, which could affect your meeting environment.

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| **Estimated Time** | 10 minutes |
| **Topic Objective** | Participants will identify the basic elements of the meeting set up |
| **Topic Summary** | Using a basic checklist helps to remember what items need to be set up in the meeting room. |
| **Materials Required** | Handout: Meeting Set-Up |
| **Planning Checklist** | Prepare enough handouts for all participants |
| **Recommended Activity** | • Distribute handouts to all participants  • Allow them 1-2 minutes to review  • Use discussion questions and discussion below to facilitate a conversation |
| **Stories to Share** | None |
| **Delivery Tips** | None |
| **Review Questions** | Q: What are the advantages of having a predefined checklist for your basic meeting set up?  A: You do not forget things, you have less stress, it is easier to set things up, etc. |

## The Extra Touches

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\MP321RS9\MC900354046[1].wmfExtra touches make your meeting more meaningful to your participants. Your handout from the last lesson outlines some items you can incorporate in you meeting set up. Let review some of the extra touches:

* Name tents already printed and set up on the tables
* Table with name tags for each participant already printed
* Projector on with a welcome message illuminating on the screen
* Signage outside the meeting room professionally done
* Keepsake or logo item at each place setting
* Music before meeting starts and during breaks
* Folder with all meeting materials inside (i.e. agenda, handouts, etc.)
* Candy or mints at the tables
* Posters or visual aids posted around the meeting room (professionally done looks better)
* Video playing relevant materials on the screen before meeting starts
* Coat rack during winter months

When it comes to adding the extra touches, be sure to gauge the audience and meeting purpose and plan accordingly. You do not want to create a celebratory experience when the meeting is about cutting costs, etc. Otherwise, going the extra mile helps to make your meeting more effective by creating a personalized environment.

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| **Estimated Time** | 10 minutes |
| **Topic Objective** | Participants will identify the extra things that make your meeting more effective and comfortable. |
| **Topic Summary** | Extra touches demonstrate you care about the participant’s comfort and the effectiveness of the meeting environment. |
| **Materials Required** | Handout: Meeting Set-Up |
| **Planning Checklist** | Prepare enough handouts for all participants |
| **Recommended Activity** | • Distribute handouts to all participants  • Allow them 1-2 minutes to review  • Use discussion questions and discussion below to facilitate a conversation |
| **Stories to Share** | None |
| **Delivery Tips** | None |
| **Review Questions** | Q: What are some extra touches you can add to your meeting?  A: Answers may vary. |

## Choosing a Physical Arrangement

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\FTRMPN7N\MC900445506[1].wmfThe types of activities that are involved in your meeting could help you determine the physical setup. However, before you think further on this topic, let us review some basic setups.

* **Conference style seating:** this is the basic long rectangular or oval shaped table. This type of setup is good for short meetings with less than 30 participants. You would use this for small training sessions and close interactions.
* **U-shape seating:** this is a setup where the tables form a U shape. This is effective where face-to-face interaction is desired. This set up also accommodates larger groups.
* **T-Shape seating:** this design sets up the tables in a T shape. This is also used for face-to-face and large group meetings; however, this shape allows for a leaders to sit at the cross point
* **Classroom style seating:** this type of seating is best when learning is going to take place and the participants need to take notes. This style can be used for both large and small groups.

Knowing the various styles of seating arrangements helps to determine which to use based on the activity. Below are some suggestions:

* Planning meeting: conference style seating
* Product sales training: classroom style seating
* Strategy sharing meeting: T-shape style seating
* Project update meeting: U-shape style seating

The physical arrangement of the meeting room should always focus on providing a comfortable set up where all participants are able to view the presenter, other participants, screens, and flipchart and whiteboards.

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| **Estimated Time** | 10 minutes |
| **Topic Objective** | Participants will identify the various physical arrangements available to them. |
| **Topic Summary** | The goal of the meeting helps to determine the physical arrangement of the room. |
| **Materials Required** | Handout: Meeting Set-Up |
| **Planning Checklist** | Prepare enough handouts for all participants |
| **Recommended Activity** | * Instruct participants to review part three of the handout * Allow them 1-2 minutes to review * Use discussion questions and discussion below to facilitate a conversation |
| **Stories to Share** | None |
| **Delivery Tips** | None |
| **Review Questions** | Q: What meeting types of meeting activities could guide you in determining the physical arrangement?  A: Teaching something, group work, giving out information, brainstorming session, conflict resolution, team building, etc. |

## Case Study

Madeline took time during her training to ask her participants to set goals for themselves. This way, they would be able to see the progress they’d made, and she would be able to measure their progress. “ I’d like for you to take some time to reflect on our topic of ‘Increasing Sales Numbers’ and set a goal for yourself. This goal should be reached within six months from the date of this training.”

As Madeline walked around the room, she saw some people looking at a blank page and scratching their heads. She said, “Remember to make a SMART goal. And by SMART, I mean, you goal should be specific, measurable, achievable, relevant, and timed.”

She walked them through what each letter in the acronym SMART meant, and at the end of the allotted time, each participant had a fantastic goal to work towards.

## Module Four: Review Questions

1. What does the ‘M’ in the SMART acronym stand for?
2. Measurable
3. Manageable
4. Meritable
   1. Material
5. In order for you to achieve a goal, which of these is something you must do?
6. Prepare, but avoid setting deadlines, as this slow down the process
7. You must set an unrealistic goal to shoot for the stars
8. You must be very clear about what exactly you want
9. You must be vague, as vague goals produce clear results
10. Before you even set goals, what is a good idea to do?
11. To set deadlines for your goals.
12. To measure what results you have from the information gathered.
13. To sit down and define your core values and your life purpose.
14. To identify how you will achieve your goal.
15. Which of these is not a common type of self-evaluation?
16. Third party inspection ratings
17. Reactionary questionnaires
18. Personal assessment quizzes
19. Self-reporting metric systems
20. What should you include in your self-evaluation so that you can evaluate the group as a whole and evaluate the individual on an objective basis?
21. Subjective answers
22. Scale-based questions
23. Open-ended questions
24. Your supervisor’s feedback
25. Why must you ensure that a peer assessment system is well designed?
26. To lead the person to the right answers
27. To receive a good rating on your evaluation
28. To bond well with your peers
29. To prevent bias
30. Which of these is a system designed to gather feedback from all of the people around an employee?
31. Supervisor feedback
32. Self-evaluation
33. 360 degree feedback
34. The 20-question evaluation process
35. What is an important part of supervisor evaluations?
36. Evaluating behavior changes
37. Assessing results
38. Defining core values
39. Both A & B
40. Which of these is a note of caution to keep in mind about supervisor evaluations?
41. The employee must know which metrics will be evaluated after the training
42. Like peer evaluation, supervisor evaluation will not be biased
43. Develop metrics just as you would for self-evaluation
44. Both A & B
45. Why might company executives want to see a high level evaluation report?
46. If the training was inexpensive
47. If the training was well-attended
48. If the training was required by the company’s HR department
49. If the training was expected to have a high impact

# Module Five: Electronic Options

Advancements in technology have made meetings more effective by providing ways of communicating and storing meeting information. Although many new tools are available to help give your meeting that cutting-edge-feel, there are many things to consider when determining electronic options. It is not always imperative to use new technology at your meetings, but having an understanding in advance helps to expand your choices. In this module, you will learn about the latest meeting tools available to you, things to consider and reaching a decision.

*The conventional definition of management is getting work done through people, but real management is developing people through work.*

***Agha Hasan Abedi***

## Overview of Choices Available

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\3YJGCFYP\MC900090045[1].wmfElectronics in meetings bring a wealth of advantages if used properly. Technology has increased the reach of the meeting room into the virtual world. You are capable of connecting with participants anywhere in the world. Technology also expands your ability to disseminate and record information. This lesson presents an overview of the various tools you can employ in your next meeting.

* **Presentation software:** programs like Microsoft Power Point help to organize your materials into one file. Once the information is in the presentation program, you can make handouts that you can give to your participants as an agenda.
* **Electronic whiteboard:** an electronic whiteboard is an efficient way to write and record ideas all with one source. The electronic device acts like a normal whiteboard, but uses special electronic markers. This electronic device also records the items written on the board for referencing later.
* **Web meeting programs:** programs similar to Microsoft Live Meeting allow you to conduct your meeting via the Internet. Voice, images from your desktop, and a web cam view of the meeting room and the individual.
* **Video conferencing**: this dedicated line uses cameras and television screens to connect two or more remote sites into one meeting.
* **Telephone conferencing:** this is a dedicated telephone line where many participants call in and participate in the meeting.

There a many variations of the electronic tools listed in the lesson that you can use. You can have your company purchase these programs or use a pay-as-you-go product from an online vendor. Choosing the type of electronic tool depends on the audience, distance and technological capabilities of the meeting place.

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| **Estimated Time** | 10 minutes |
| **Topic Objective** | Participants will identify the various electronic options they can use in their meetings. |
| **Topic Summary** | Using technology in your meetings can improve the efficiency. |
| **Materials Required** | Handout: Electronic Options |
| **Planning Checklist** | Prepare enough handouts for all participants. |
| **Recommended Activity** | * Distribute handouts to all participants * Allow them 1-2 minutes to review * Use discussion questions and discussion below to facilitate a conversation   Facilitator Note: Instruct participants to keep the Electronic Options handout handy for the next lesson. |
| **Stories to Share** | None |
| **Delivery Tips** | None |
| **Review Questions** | Q: What are some of the benefits of using the electronic options found on the handout I just gave you?  A: Time savings, remote access, easy of tracking discussion, etc. |

## Things to Consider

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\1JXY5E11\MC900383238[1].wmfThe most important thing to consider when dealing with electronic meeting tools is your ability to use and troubleshoot them. Many things could affect the performance of the tools. You must be comfortable enough with the technology to deal with the unexpected. In order to avoid embarrassing issues during the meeting, you should test all systems and make sure your Information Technology (IT) department supports them. In fact, you should always run your technology plans with your IT. They may need to do some backend things to help support your video or web conferencing tool. Before you try using a new tool, get some training and practice. Understanding your electronic tool could take some reading and practice. Test the program with someone you know. Practice using the tool in smaller, more personal meetings before you decides to do it in a larger meeting with outside guests.

Avoid using technology just for the sake of using it. Use it only when it is necessary. Make sure that the participants who will need to use the tools to participate are capable of using it themselves. The last thing you want is someone telling you in the middle of the meeting that they do not know how to launch the program. Here is a quick list of things to consider if you plan to use technology:

* Is the complexity of adding the technology outweighing the potential glitches?
* Are you capable enough to handle any issues that may arise during your meeting?
* Is your audience capable of handing the technology?
* Will you have adequate support from your IT department?
* Are there any costs that you have to consider?

In any case, using technology requires knowledge. If you desire to use technology in your meetings, learn the system and practice, practice, practice. Finally, do not get carried away with technology. It becomes obvious when technology is being used just to dazzle the audience. This is distracting and reduces the effectiveness of your meeting.

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| **Estimated Time** | 10 minutes |
| **Topic Objective** | Participants will identify the challenges to using electronics in their meetings. |
| **Topic Summary** | Technology always presents potential issues especially to the novice user. |
| **Materials Required** | Handout: Electronic Options |
| **Planning Checklist** | * Have participants use the previous handout from lesson one for this activity * Have flip chart and markers ready * Write the names of each electronic category on the handout at the top of the flip chart paper, creating columns for each category. |
| **Recommended Activity** | * Have the tables choose a leader * Ask the participants to place a check next to the item on the handout that the feel most comfortable using. * Have the leader tally for each category the participants who feel comfortable using the technology * Have the leaders share for each category the number they recorded in the last step * Tally the numbers under each category * Repeat for until each leader at every table shares their results * Add the numbers up for each category * Calculate a quick percentage for each category |
| **Stories to Share** | None |
| **Delivery Tips** | None |
| **Review Questions** | Q: What challenges do you face when dealing with electronic tools?  A: Connection issues, program problems, network problems, understanding the tool itself |

## Making a Final Decision

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\1JXY5E11\MC900053925[1].wmfThis assessment allows you to determine quickly if you need to use technology or not. When making a decision determines the following:

* Am I proficient with the technology?
* Am I able to acquire someone who is proficient and can assist me with the technology?
* Will there be people connecting to my meeting from remote locations?
* Is there a large number of graphics that will be presented?
* Are the participants capable of using the technology?
* Does the meeting room support technology?
* Do you have IT support available?
* Do you have the budget to support the technology?

If you answer “no” to any of these questions, determine the risk of going ahead with the technology. If it is too risky, avoid using the technology, unless you must like in the case of remote conferencing. Just make sure you get the training you need well in advance or get someone to be there as a technical helper if technology is unavoidable.

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| **Estimated Time** | 10 minutes |
| **Topic Objective** | Participants will understand how to make a final decision when determining to use technology in their meetings. |
| **Topic Summary** | Doing a quick assessment of the meeting helps to make a final decision on using technology at the next meeting. |
| **Materials Required** | Handout: Technology Assessment |
| **Planning Checklist** | Prepare enough assessments for all the participants |
| **Recommended Activity** | * Distribute assessment to all participants * Allow them 1-2 minutes to review * Use discussion questions and discussion below to facilitate a conversation |
| **Stories to Share** | None |
| **Delivery Tips** | None |
| **Review Questions** | Q: What questions do you have about making a final decision on using technology?  A: Answers may vary. |

## Case Study

Bobby gave trainings for many years. He was helping an intern, Deirdre, plan her first training. Together, they looked over her learning objectives.

Bobby said, “Now this learning objective is okay. It says, ‘Complete Training on Excel.’ However, you should begin by writing high-level objectives. What could take this from being an ‘okay’ objective to a higher level objective?”

Deirdre thought for a moment. Then she said, “How about ‘understand how to create graphs in Excel?’”

“Great!” Bobby said. “What if you wanted to make the goal even more detailed?”

Deirdre said, “I could have the goal be ‘Understand how to fill in worksheet data, the elements of a graph, and how to apply a pre-designed graph layout’.”

They worked together on each goal, making them both high-level and detailed.

## Module Five: Review Questions

1. Which of the following is a type of software useful for presentations?
   1. Microsoft Outlook
   2. Microsoft Power Point
   3. Microsoft Access
   4. Microsoft One Note
2. Video conferencing connects two or more:
   1. Remote sites
   2. Cameras
   3. Television screens
   4. Skype accounts
3. What is the most important thing to consider when dealing with electronic meeting tools?
   1. Affordability
   2. Your ability to use and troubleshoot them
   3. Reputation of electronic tools
   4. General acceptance of specific electronic tools
4. When is using technology recommendable for the meetings?
   1. In case of larger meetings
   2. In case of longer meetings
   3. Always
   4. Only when it’s necessary
5. Which of the following questions is not crucial when you need to decide will you use technology for the meeting?
   1. Is there a large number of graphics that will be presented?
   2. Do you have IT support available?
   3. Will there be people connecting to my meeting from remote locations?
   4. All of the questions above are crucial
6. If using technology is too risky, what should you do?
   1. Discuss with other participants about it
   2. Take the risk anyway
   3. Avoid using technology
   4. Take the risk, but prepare a backup plan
7. What was Bobby and Deirdre’s goal in the example shown in case study?
   1. Higher-level objectives
   2. Original objectives
   3. Acceptable objectives
   4. Readymade objectives
8. If Bobby and Deirdre’s detailed goal was ‘Understand how to fill in worksheet data, the elements of a graph, and how to apply a pre-designed graph layout’, what would be their original goal?
   1. Apply technology on meetings
   2. Apply technology on business
   3. Complete training on Excel
   4. Explore the possibilities of graphs

# Module Six: Meeting Roles and Responsibilities

*Do not follow where the path may lead. Go instead where there is no path and leave a trail.*

***Harold R. McAlindon***

C:\Program Files (x86)\Microsoft Office\MEDIA\CAGCAT10\j0233018.wmfEstablishing clear roles and responsibilities in your meeting helps to manage the meeting effectively. When roles are established, the participants have a clear understanding of what is taking place because the person in a specific role has a job to fulfill. Assigning roles also alleviates the task you have to manage. This way you can focus on the role you are to manage within the meeting time. Remember that you do not have to do it all. Get others involved.

In this module, you will learn the role of the Chairperson, Minute Taker, and the Attendees. Finally, you will learn how to vary the roles for large and small meetings. Let us begin first by identifying the role of the Chairperson.

## The Chairperson

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\3YJGCFYP\MC900295404[1].wmfThe meeting chairperson is responsible for directing the proceedings of the meeting. They are time managers, referees, and enforcer of the rules when they are broken. The chairperson does not necessarily have to be you all the time, but when you do defer the chairperson’s duty to someone other than you, make sure you are confident the chairperson you choose can handle the role. The chairperson must be able to lead the meeting and be firm throughout the meeting.

Here are additional responsibilities of the chairperson:

* Be aware of the rules of the meeting if present
* Keep to the aim or objective of the meeting
* Remain fair with all participants
* Start the meeting
* Transition from agenda topic to the next
* Introduce the next presenter
* Handle disruptions

**Some of the qualities a chairperson should possess are as follows:**

* They should have some level of authority
* Demonstrate flexibility
* Remain impartial
* Display maturity

The role of the chairperson is essential if the meeting is to have some form of control. If you are the chairperson, make sure you do not take on additional roles. You want to remain focus on the tasks associated with the role of the chairperson. If you select another person to be the chairperson, it is a good practice to meet with him or her in advance of the meeting to coordinate the agenda and set expectations. You want to avoid miscommunication during the meeting, which could hurt the credibility of both your chairperson and yourself.

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| **Estimated Time** | 10 minutes |
| **Topic Objective** | Participants will identify the role and responsibilities of the Chairperson. |
| **Topic Summary** | The role and responsibility of the Chairperson is to direct the proceedings of the meeting. |
| **Materials Required** | Handout: Chairperson Role, Sticky Notes, Pens |
| **Planning Checklist** | * Print enough handouts for all participants * Place sticky notes and pens on tables before class starts * Write Chairperson on top of the flip chart paper |
| **Recommended Activity** | * Have the table select a leader * Tell the class to write down several ideas on what the role of the chairperson is. * Allow 3-5 minutes * Go around to each table and have the leader share one idea they noted * List what they share on the flip chart paper * Continue until all tables shared what they noted * Distribute the handout to all participants * Probe for any questions   Facilitator Note: Avoid allowing one table share all their ideas in the activity. You want to give the other tables a chance to share. |
| **Stories to Share** | None |
| **Delivery Tips** | None |
| **Review Questions** | Q: What are some qualities you must possess in order to be an effective chairperson?  A: Answers will vary. |

## The Minute Taker

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\FZCJR17Y\MC900150006[1].wmfTaking minutes requires some basic skills. For instance, a good minute taker will possess great listening skills, and attention to detail. Furthermore, they should have excellent writing skills and communication skills. The person you select must be able to maintain focus and not be carried away with the meeting, missing crucial meeting information. It is best to select someone who is not directly involved in the meeting, allowing them not to participate. Here is a list of tasks the minute taker should handle:

* Before the meeting
  + Determine what tool to use for recording the minutes (ex. Laptop, paper, recording)
  + Become familiar with the names of the attendees and who they are
  + Obtain the agenda and become familiar with the topics
* During the meeting
  + Take attendance
  + Note the time the meeting begins
  + Write the main ideas presented in the meeting and the contributor of that information
  + Write down decisions made and who supported and opposed the decision
  + Note follow up items
  + Note items to be discussed in the next meeting
  + Note the end time of the meeting
* After the meeting
  + Type up the minutes immediately after the meeting (if manual notes or recordings were taken)
  + Proofread the minutes and correct any errors in grammar and spelling
  + Save or send the document to the meeting owner

Using a template helps to keep the minute taking consistent. Remember to meet with the person you choose to be your minute taker before the meeting to go over the template.

|  |  |
| --- | --- |
| **Estimated Time** | 10 minutes |
| **Topic Objective** | Participants will identify the tasks the Minute Taker does in a meeting. |
| **Topic Summary** | Minute taking involves more than just taking notes so be sure the person you select understands the role. |
| **Materials Required** | Minute Taker Role Job Aid, Meeting Minutes Template, Flip chart |
| **Planning Checklist** | * Prepare enough job aids and templates for all participants * Write “Minute Taker Skills” at the top of the flip chart page |
| **Recommended Activity** | * Distribute job aids and templates to all participants * Allow participants 1-2 minutes to review * Have the participants brainstorm the skills needed to be a minute taker * Allow 1-2 minutes * Ask for volunteers to share their answers * Note them on the flip chart * Have the participants write these skills on the blanks in their job aid. * Explain to the participants that the template is meant to be given to the person they task as the minute taker. It is recommended to meet with that person before the meeting to go over the template. |
| **Stories to Share** | None |
| **Delivery Tips** | None |
| **Review Questions** | Q: What are some duties you know of regarding the minute taker?  A: Answers will vary. |

## The Attendees

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\9MJXCRQW\MC900197753[1].wmfThe attendees are not excluded from assuming a role or having a responsibility in the meeting setting. Of course, you cannot force the responsibility on to your attendees, but you can attempt to influence them. The attendees are the biggest success factor of your meeting. If they feel that they accomplished something in the meeting, they will applaud you. However, if they walk away feeling they wasted their time, this could affect your credibility. The following are responsibilities your attendees could assume:

* Prepare
  + Be prepared to contribute to the meeting
  + Be prepared to arrive early and avoid being late
  + Be prepared for the meeting by jotting down ideas and questions ahead of meeting
  + Be prepared by reading the agenda before the meeting
  + Be prepared for a long meeting by getting enough rest the night before
* Participate
  + Ask questions
  + Take notes
  + Share ideas
* Productive
  + Avoid carrying side conversations
  + Remove distractions like cell phones and PDA’s
  + Keep to the allotted time if on the agenda

Setting up expectations is the best way to communicate the role of the attendees. This is accomplished in either the meeting invitation, or separate email to the attendees. In any case, it is worth the time. Remember that all participants play a vital role in the meeting. Your job is to remind them of their role and the responsibility that comes with that role.

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| **Estimated Time** | 10 minutes |
| **Topic Objective** | Participants will identify the role of the attendee in a meeting. |
| **Topic Summary** | The attendee’s role is summed up in three categories:   * Prepared * Participate * Productive |
| **Materials Required** | Worksheet: Attendee’s Role |
| **Planning Checklist** | Prepare enough handouts for all participants |
| **Recommended Activity** | * Distribute worksheets to all participants * Instruct participants to fill in the columns below each category (prepare, participate and productive) * Encourage them to work in groups * Allow 3-5 minutes. |
| **Stories to Share** | None |
| **Delivery Tips** | * Ask volunteers to share what they wrote down in one of the three columns. * Do the same for the other columns * Repeat this until you get 7 to 8 participants sharing |
| **Review Questions** | Q: How can you encourage your attendees to fulfill their role in the meeting?  A: Set expectations in the invitation, before the meetings stars, etc. |

## Variations for Large and Small Meetings

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\FTRMPN7N\MC900446010[1].wmfLarge meetings present very different dynamics than smaller meetings. Managing a larger meeting requires more resources and assigned roles. If you are chairing the meeting yourself, you will need to rely on others to ensure all things are well executed. Here is a list of additional roles you may want to add when managing a large meeting:

* An extra minutes taker for better accuracy
* A person to distribute all the materials related to the meeting
* A person to greet attendees
* A person to run the audio and visual equipment
* A person to manage the hospitality aspect of your meeting
* A co-chairperson
* A person managing the presentations

On the other hand, in small meetings, you can assume multiple roles. For example, you can be the chairperson, technical person, and the minute taker in a small meeting. Small meetings are less formal and you can leverage the informal environment to multitask. You may need an assistant if the meeting is comprised of important people. In any situation, careful planning and assessing the risk of working with less roles will help you to determine what roles need to be filled. When in doubt, get more help. Err on the side of caution.

|  |  |
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| **Estimated Time** | 5 minutes |
| **Topic Objective** | Participants will identify the variations in roles for large and small meetings. |
| **Topic Summary** | Large meetings require more structure than smaller meetings. |
| **Materials Required** | Handout: Variations |
| **Planning Checklist** | Prepare enough handouts for all participants |
| **Recommended Activity** | * Distribute handouts to all participants * Allow them 1-2 minutes to review * Use discussion questions and discussion below to facilitate a conversation |
| **Stories to Share** | None |
| **Delivery Tips** | None |
| **Review Questions** | Q: What are some adjustments you can make when the meeting is for a large group? Small group?  A: Answer will vary. |

## Case Study

Darius stopped by Fran’s office and asked her, “Would you be able to look over some evaluation points for me?”

Fran said, “As long as you don’t mind me looking them over while I eat my sandwich.”

Darius and Fran sat down together at lunch, and Fran looked over his evaluation points. “These are good,” she said. “Each point begins with a verb, and you have approximately four points per eight hours of training. However, one of your points isn’t measurable. You’ll want to change the wording so that the goal is objective and measurable.”

Darius said, “Thanks, Fran. After this I suppose I’ll be finished.”

“Not so fast now. You still need to have the points approved by the stakeholders and reviewed by the trainees!” When Darius presented his information, it was excellently worded and easily approved and reviewed.

## Module Six: Review Questions

1. Which of the following is not something that chairman must do?
   1. Start the meeting
   2. Come up with the final solution
   3. Introduce the next presenter
   4. Take care of the rules
2. Which of the following is not a necessary quality of a chairman?
   1. Authority
   2. Strictness
   3. Flexibility
   4. Impartiality
3. Which of the following is not something necessary for a good minute taker?
   1. Writing abilities
   2. Listening abilities
   3. Paying attention to details
   4. All of the above is important
4. Which tool is the best for minute taking?
   1. Lap top
   2. Paper
   3. Recording
   4. Every tool can be equally good
5. Who is the most important success factor of a meeting?
   1. Facilitator
   2. Chairman
   3. Attendees
   4. Minute taker
6. What is the best way to communicate the role of the attendees?
   1. Casual, friendly, non-conventional approach
   2. Setting up tight rules
   3. Setting up expectations
   4. Individual meetings before the main meeting
7. Multitasking is typical for:
   1. Larger meetings
   2. Smaller meetings
   3. Medium meetings
   4. All of the above
8. Which of the following is usually not necessary on larger meetings?
   1. Extra minute taker
   2. Co-chairman
   3. Co-facilitator
   4. A person to greet the attendees
9. What was Darius’ problem with evaluation points presented in case study?
   1. Evaluation points were too extensive
   2. One of the points was immeasurable
   3. Some points were unfounded
   4. Evaluation points were not precise
10. Who should approve Darius’ evaluation points?
    1. Chairman
    2. CEO
    3. Stakeholders
    4. Trainees

# Module Seven: Chairing a Meeting (I)

*There go the people. I must follow them for I am their leader.*

***Alexandre Ledru-Rollin***

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\1JXY5E11\MC900324588[1].wmfChairing the meeting is a leadership role. You must be ready and able to stand up and kick off the  
meeting without sounding nervous or uncomfortable. Your ability to communicate early in the meeting sets the tone of the meeting. Chairing a meeting effectively takes time to develop and requires practice.

This module is part one of two modules that teaches how to effectively chair a meeting. The first part, will teach how to start your meeting on the right foot. Next, we will discuss the role of the agenda and finally, we will discuss how to use the parking lot. All these techniques are designed to make you a more effective chairperson. In fact, you will get an opportunity to practice commencing a meeting. Do not worry. This is a safe learning environment where you will not be forced to do something you are not comfortable doing. However, remember to use your action plan if you need more practice chairing a meeting. Let us start this module from the top, which is getting off on the right foot.

## Getting Off on the Right Foot

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\9PDUOZYV\MC900310286[1].wmfOpening your meeting effectively requires both a technique and a flow. The **SIGNALS** flow gives you an easy model to follow when opening the meeting. Here is a breakdown of the acronym:

* **Salutation** is opening the meeting by welcoming and greeting your participants
* **Introduction** is where you introduce who you are
* **Guest mentioned** is where you introduce those attendees that are special guests
* **Need-to-know** is a list of things like logistics, bathroom location, fire exits, general meeting format that is shared with the attendees
* **Agenda** is where you discuss the purpose of the meeting and give a brief overview of the agenda
* **“Laws of the meeting”** is where you discuss how the meeting is going to run. This includes policies on electronic devices, participation, and handling conflict.
* **Segue** is the part of your introduction that links this part to the next topic, which in this case will be the role of the agenda.

Practicing your opening is the best way to become better at it. Over time, you will develop your own style, which will be comfortable to you. In any case, you will need to do it in order for you to learn it.

|  |  |
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| **Estimated Time** | 30 minutes |
| **Topic Objective** | Participants will identify the components of a good meeting opener. |
| **Topic Summary** | The opening dialogue is a signals of the start of your meeting and it should include the following:   * Salutation * Introduction * Guests mentioned * Need to knows * Agenda * Laws of the meeting * Segue into the next talking point |
| **Materials Required** | SIGNALS Job Aid, Today’s Agenda |
| **Planning Checklist** | Prepare enough job aids for all participants |
| **Recommended Activity** | * Distribute job aids and handouts to all participants * Have each participant prepare an opening dialogue * Set the expectation that many of them will share their opener with the class * Set the expectation that both praise and critique will be shared * Allow 5-7 minutes * Ask for volunteer to share their opener * Have the volunteer share as if they are really opening a meeting * Have several share their opener   Facilitator Note: Praise all those who attempt their opening in front of the class. |
| **Stories to Share** | None |
| **Delivery Tips** | None |
| **Review Questions** | Q: What presented a challenge to you?  A: Answer will vary. |

## The Role of the Agenda

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\3YJGCFYP\MC900383516[1].wmfThe agenda is an entity that plays a vital role like the chairperson or minute taker. Is should not be ignored, because if it is ignored, your meeting will experience time and participant management problems. Many times meetings run over or are cut short leaving topics unaddressed that were on the agenda. Consistently missing the agenda time and topics is a sign of poor meeting management. Here is a list of items the agenda accomplishes when handled as a role at the beginning of the meeting:

* The agenda communicates:
  + Meeting topics
  + Presenters
  + Time allotment for each speaker
* The agenda provides focus by:
  + Stating the meeting objectives clearly
  + Outlining the meeting in increments of time
  + Providing a checklist of things to accomplish in the meeting
  + Allowing the attendees to see both the beginning and the end of the meeting, avoiding them becoming distracted when they are left wondering when this meeting end will

Here is a sample introduction of how to introduce the agenda as a role at the beginning of the meeting:

*“The agenda today will help us meet today’s goal of deriving a good sales strategy. We have four presenters who are going to discuss how to present the new product, handle objections, gain commitment, and close the sale. The agenda will be our guide so we can stay on track and finish on time.”*

Simply handing out the agenda does not communicate its role. You must introduce it like any other person that has a role in the meeting.

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| **Estimated Time** | 10 minutes |
| **Topic Objective** | Participants will understand the role of the agenda in their meeting. |
| **Topic Summary** | The agenda itself has a role in the meeting like any other attendee and should be recognized at the beginning of the meeting. |
| **Materials Required** | Flip Chart |
| **Planning Checklist** | Have flip chart ready before the lesson |
| **Recommended Activity** | * Instruct participants to choose a table leader * Have the participants brainstorm ways the agenda’s role could be introduced at the beginning of the meeting. * Allow 2-3 minutes * Have each table leader share one thought from their team * Write their thought on the flip chart * Go around the room until all have shared without repeating previous answers. * Review the answers |
| **Stories to Share** | None |
| **Delivery Tips** | Say, “You all did an excellent job of emphasizing the role of the agenda.” |
| **Review Questions** | Q: Why should we introduce the agenda at the beginning of the meeting?  A: It plays a key role in how the meeting is to flow. |

## Using a Parking Lot

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\9PDUOZYV\MC900290392[1].wmfUsing a parking lot in your meetings provides a place where topics that cannot be answered during the meeting are noted for follow up later. Sometimes the topics in the parking lot may be answered during the course of the meeting, but this is unusual. The parking lot is simple to implement. You could create a physical place by using piece of flip chart paper with sticky notes. Perhaps you prefer electronic documentation. You can collect parking lot topics onto a spreadsheet. Whatever you choose, you need to have a basic format. Here are some things to consider:

* Take a few moments to share with the attendees how the parking lot works
  + Meant for topics that require follow up after the meeting
  + Hold questions that can be answered later in the meeting
* Provide brief instruction on how to register a parking lot issue
  + Provide the question or topic, name, and contact information, on a sticky note or verbally to the minute taker
  + Chairperson will review parking lot topics to determine if the topic requires follow up after the meeting.
  + Follow up communication will be sent to all the members of the meeting

The parking lot is helpful in managing your time. It gives you the ability to move off a topic that requires more research and time to develop. Remember to check the parking lot at the end of the meeting and always be sure to follow up when you say you will.

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| **Estimated Time** | 5 minutes |
| **Topic Objective** | Participants will identify the purpose of the parking lot in meetings. |
| **Topic Summary** | The parking lot is a useful tool meant to hold questions that cannot be answered in the meeting and need following up. |
| **Materials Required** | Handout: Parking Lot |
| **Planning Checklist** | Prepare enough handouts to all participants |
| **Recommended Activity** | * Distribute handouts to participants * Hold a brief discussion on the features and benefits of the parking lot. |
| **Stories to Share** | None |
| **Delivery Tips** | None |
| **Review Questions** | Q: What are some reasons to place a topic on the parking lot?  A: Answers will vary. |

## Case Study

Scott sighed as he looked over the evaluation methods he and his team had decided to use after the workshop. He sought out his co-worker and friend, Parameet, for help.

Parameet asked, “What seems to be the problem?”

Scott said, “We developed a rating system to objectively gather information on workplace observation, but I still feel like we’re missing something.”

After a moment of thinking, Parameet asked, “Have you considered a 360 degree feedback rating? That would give you feedback from several sources at once and increase accuracy.”

Scott smiled. “That’s a great idea.” “Is this the only evaluation tool you’re using?”

“No way,” Scott said. “If I’m going to gather information through workplace observation, I also need to supplement the evaluation with more objective methods.”

After the brainstorming session, Scott’s evaluation tools successfully captured data.

## Module Seven: Review Questions

1. What is ‘I’ in SIGNALS flow?
   1. Introduction
   2. Interpretation
   3. Interpersonal skills
   4. Impartiality
2. What’s the last part of SIGNALS flow?
   1. Salutation
   2. Segue
   3. Simplification
   4. Scheme
3. Which of the following is not something agenda communicates?
   1. Meeting topics
   2. Time allotment for each speaker
   3. Presenters
   4. Backup plan
4. What should you do with the agenda at the beginning of the meeting?
   1. Hand it out to attendees is enough
   2. Ask somebody to read it out loud
   3. Introduce it to attendees
   4. All of the above are acceptable options
5. The case where you have topics in the parking lot being answered during the course of the meeting is:
   1. Recommendable
   2. Strictly not recommendable
   3. Unusual
   4. Casual
6. Who should review parking lot topics to determine if the topic requires follow up after the meeting?
   1. Chairperson
   2. Minute taker
   3. A person specially engaged to do that
   4. Anybody
7. How could 360 degree feedback rating help Scott with his problem presented in the case study?
   1. It could make it more organized
   2. It could increase accuracy
   3. It could make it look better
   4. It could make it easier to read
8. Scott’s evaluation tools successfully captured data after:
   1. Brainstorming session
   2. Talk with his co-worker
   3. Exploring the Internet
   4. Exploring company’s old data

# Module Eight: Chairing a Meeting (II)

*What chance gathers she easily scatters. A great person attracts great people and knows how to hold them together.*

***Johann Wolfgang Von Goethe***

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\OVV8IZ9R\MC900324590[1].wmfIn the last module, we focused on starting the meeting on the right foot. Chairing the meeting for the remainder of the time requires diligence and discipline. It is almost like being a referee. You will have to make calls and manage the game and watch for violations. However, unlike a game, the meeting room presents many challenges, because the rules tend to change from meeting to meeting. At least this is from the attendees’ perspective. Your goal is to break that trend by chairing your meeting with purpose and a goal in mind.

In this module, you will learn techniques on how to keep your meeting on track, deal with overtime and holding participants accountable. Doing all this requires focus and a sense of doing what is right for the sake of all your attendees. Neglecting this could affect the meeting experience for many who will sit there and silently criticize your meeting management skills. Worse yet, they may get up and walk out, because they feel they are wasting their time. Let us begin by learning how to keep the meeting on track.

## Keeping the Meeting on Track

In order to keep your meeting on track, you should set clear expectations on how time management will be used in the meeting. Setting expectations up front avoids surprised and indignation from the presenter, because they are not caught off guard. In addition, as a chairperson, you must feel comfortable interrupting the presenter when necessary. Many times the presenter would like to be told their time is up. This way they do not have to worry about time. The **STOP** technique helps to keep your meeting on track by doing the following:

* **Set expectations:** letting your presenters and attendees know you intend on managing the agenda vigorously removes the element of surprise. When you neglect to set time management expectations, you are subject to an array of reactions from the presenter and attendees. It may be taken as rude behavior. It does not have to be that way. Let the presenter know that you will give them a signal at five and two minutes remaining. In addition, set expectations for questions and answers. Telling attendees to write their questions down to be asked at the end of the presentation avoids unnecessary interruptions, potentially side tracking the conversation.
* **Time the presenter:** using a timer is the best way to manage the time of your meeting. Keep to the allotted time for both the presentation and the question and answer activity. Always provide a warning time so the presenter does not have to stop abruptly.
* **Overcome fear of interrupting:** perhaps you do not have a problem with this, but there are many who see interrupting someone as rude and find it difficult to do. The best way to overcome this is by setting those expectations upfront. This way you know the presenter is expecting an interruption. The same holds true for questions being asked. If left unchecked, you could lose a lot of time by allowing excessive questions. Use your parking lot to hold questions that require more thought in answering. Call time on questions and answers so you can move to the next topic.
* **Politely warn people time is nearing:** avoid being harsh and rigid. Treating others with respect is the best way to keep the meeting moving and with plenty of participation. You do not want them to shut down because you are becoming a tyrant.

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| **Estimated Time** | 10 minutes |
| **Topic Objective** | Participants will identify various techniques on how to keep the meeting on track. |
| **Topic Summary** | When it comes to keeping your meeting on track, use the STOP technique, which is set expectations, time each participant, overcome fear of interrupting and politely warn presenter time is almost up. |
| **Materials Required** | Handout: STOP, Flip Chart |
| **Planning Checklist** | Prepare enough handouts to all participants |
| **Recommended Activity** | * Have tables determine a leader * Distribute handout * Allow participants a few moments to review the material * Assign each table a letter from the STOP technique * Tell them that the team has to come up with several ways of supporting the technique in the meeting room. * Give each table a sheet of flip chart paper to write their responses * Allow 3-5 minutes * Have each table leader present their answer to the class   Facilitator Note: If you have more than four groups, double up the assignment for each letter. |
| **Stories to Share** | None |
| **Delivery Tips** | None |
| **Review Questions** | Q: How does setting expectations help you keep you meeting on track?  A: Presenters will expect you to tell them when to stop talking, remove surprises, etc. |

## Dealing with Overtime

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\MP321RS9\MC900055299[1].wmfGoing into overtime presents several problems. Once the meeting extends beyond its original end time, you will begin to lose the attendees’ attention. This is particularly obvious in large meetings. No matter what size meeting you are dealing with, the goal to dealing with overtime is to acknowledge it before it happens. Look at the agenda and determine if you will need to go over. If you do, then do the following to mitigate the effects of going into overtime:

* Determine your constraints
  + Is the room or venue available for overtime
  + Do attendees have to travel and cannot stay
* Warn attendees in advance that the meeting will over run
* Determine how much more time will be needed
* Communicate the extra time to the attendees
* In a small meeting, gain consensus to go into overtime
* Give choices
  + In a large meeting, provide a brief break at the normal end time so those who have to leave will do so during the break and not the meeting
  + In a small meeting, allow those who need to leave to do so
* If overtime is not an option, determine what agenda items will be missed and plan an alternative way of getting the information to the attendees
  + Follow up email
  + Topic saved for next meeting

If you do not manage overtime, then you will see frustration build among the attendees. Have a plan in place so you know what to do once you determine if your meeting is going to run longer than expected.

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| **Estimated Time** | 10 minutes |
| **Topic Objective** | Participants will identify the steps to dealing with overtime. |
| **Topic Summary** | Gaining consensus is the best way to gauge the attendees’ willingness to go into overtime. |
| **Materials Required** | Overtime Job Aid, Flip Chart |
| **Planning Checklist** | Have flip chart ready, Prepare enough job aids for all participants |
| **Recommended Activity** | * Ask participants to share how they feel when a meeting begins to go into overtime. * Write responses on flip chart * Ask participants to share what happens when the meeting goes into overtime * Write responses on flip chart * Ask participants to share what are some ways to avoid this from happening * Distribute job aid |
| **Stories to Share** | None |
| **Delivery Tips** | Look at some ways you can hold participants accountable. |
| **Review Questions** | None |

## Holding Participants Accountable

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\39XQYYJK\MC900060132[1].wmfIn a meeting, it may be difficult to hold participants accountable. Participation, questioning, and preparedness could easily be overlooked. Holding your participants accountable involves communication.

Here are three basic steps you can take to holding your participants accountable:

1. **Set your expectations:** in advance, perhaps in your invitation you should outline what you expect from the participants in this meeting. You may need them to bring questions, or help by providing information. You may want them to participate with vigor. In any case, you must outline what you expect of them before you can hold them to a standard or expectation.
2. **Clarify the consequences:** let the participants know how you plan to hold them accountable. Perhaps you can warn that you will be calling on everyone for answers. You may also leverage their manager if applicable. You may say that you will be sending the meeting minutes to their supervisors where they can see if they participated or not.
3. **Follow through:** if you said you would do something, then you have to do it. Do not get into the habit of making empty threats. People will respect you and will naturally be accountable to you because of your work ethic.

Most participants do not want to be on the “bad” side. They want to contribute. Your ability to assert yourself and communicate with clarity your expectations, consequences and determination will make this an easy process with practice.

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| --- | --- |
| **Estimated Time** | 10 minutes |
| **Topic Objective** | Participants will identify the three steps to holding their participants accountable. |
| **Topic Summary** | Holding participants involves three steps:   * Set your expectations * Clarify the consequences * Follow through |
| **Materials Required** | Flip Chart |
| **Planning Checklist** | Have flip chart ready |
| **Recommended Activity** | * Form teams * Have teams select a presenter * Give each team a piece of flip chart paper * Give each team one of the three steps of holding participants accountable * Have them title their piece of flip chart paper with that step * Have them write their ideas on how to accomplish the step they were assigned * Allow 3-5 minutes * Review their papers |
| **Delivery Tips** | What questions do you have regarding accountability? |
| **Review Questions** | Q: In what ways can we hold our participants accountable?  A: Tell them they should ask questions, be prepared, participate, etc. |

## Case Study

Vaughn showed his supervisor, Natalia, his full plan for evaluation before and after his training. Natalia found many aspects of the evaluation satisfactory and above satisfactory. However, when it came to evaluations during the training, she had some questions. “Vaughn,” she said. “I notice that while you have excellent learning objectives and plans for many different situations, it appears that you’re not planning to give mid-point tests.”

Vaughn responded honestly, “I guess I hadn’t thought about that. Most of the trainings I’ve given before have been small in attendance and were follow-up trainings.”

Natalia nodded. “Right. This training will be attended by a large number of people and the content is quite difficult. Let’s develop a midpoint test that you can give out to evaluate how participants are learning during the training.”

They came up with objective, measurable ways to evaluate learning, and the evaluation during the training was successful.

## Module Eight: Review Questions

1. What is ‘S’ in STOP technique?
   1. Setting rules
   2. Setting expectations
   3. Setting deadlines
   4. Setting consequences
2. In STOP technique, ‘O’ is for overcoming the fear of:
   1. Being disrespected
   2. Time issues
   3. Being rigid or harsh
   4. Interrupting
3. What is the biggest problem with meeting which overrun their original end time?
   1. The venue may not be available for overtime
   2. Attendees lose concentration
   3. Ideas usually deteriorate
   4. You can suffer serious consequences
4. Which of the following is not something that mitigates the effects of going overtime?
   1. Giving choices to attendees
   2. Warning attendees that the meeting will be overtime
   3. Determining your constraints
   4. Informing attendees that the meeting is already overtime
5. Which of the following is not one of the basic steps for keeping attendees accountable?
   1. Setting expectations
   2. Clarifying consequences
   3. Making limits
   4. Follow trough
6. Holding your participants accountable primarily involves:
   1. Their own choice to participate
   2. Keeping authority
   3. Communication
   4. Non-formal atmosphere
7. What was Vaughn’s problem presented in the case study?
   1. The whole evaluation plan was under satisfactory
   2. Vaughn missed some parts
   3. Vaughn didn’t give mid-point tests
   4. Vaughn’s form was wrong
8. Why was Vaughn’s omission so bad?
   1. Because the training will be attended by large number of people
   2. Because it shows that he didn’t learn the technique
   3. Because it shows that Vaughn worked superficially
   4. Because it shows that Vaughn is irresponsible

# Module Nine: Dealing with Disruptions

*There are only two words that will always lead you to success. Those words are yes and no. Undoubtedly, you’ve mastered saying yes. So start practicing saying no.*

***Jack Canfield***

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\EOAYJ771\MC900055019[1].wmfDisruptions in the meeting are bound to happen. Personal technology keeps participants constantly connected to the outside world. Frequent disruptions could impede the effectiveness of your meeting and become distracting to those who are focused on the meeting. Furthermore, poorly managing disruptions will reflect on the chairperson or meeting organizer. The key to mitigating disruptions is to plan for them and setting expectations.

In this module, you will learn how to deal with participants constantly running in and out of your meeting, cell phones, off topic discussions and conflicts. The goal is to reduce the affect. It is very difficult to avoid these distractions. It is human nature. Let us begin the module with a lesson on how to deal with participants constantly leaving the meeting.

## Running in and Out

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\3YJGCFYP\MC900363504[1].wmfConstant disruptions caused by attendees running in and out of your meeting will affect the experience for the other attendees. We often take it for granted that attendees will stay in the meeting and not leave. Therefore, we do not discuss this issue very often at the beginning of the meetings. Addressing this form of distraction is best done proactively. Using the **SIT** technique helps your set the expectation regarding running in and out of the meeting. Next, incorporating frequent breaks lessens the changes of participants leaving the room, and finally giving timely feedback to those who break the rule is necessary in order to stop frequent violators. Let us review each step in more detail.

* **Set expectations**: tell your participants at the beginning of the meeting what you expect of them when it comes to staying in the meeting room. Tell them the effects of constantly running in and out of the meeting on the presenter and other participants. Let all the participants know that if they need to leave the room to do so only if it is an emergency and if it is a severe problem, that they should leave the meeting. They will be more of a distraction if they stay.
* **Incorporate frequent breaks**: at the beginning of your meeting, tell the participants they will get a five-minute break every hour the meeting lasts. Establishing this up front let the participants know when to expect a break and wait until then to call people back, etc.
* **Timely feedback given to those who break the rules**: when you have a person still running in and out of your meeting, it is best to address that with them as soon as possible. If you have a problem participant, quietly leave the room and wait for them outside. Speak with the participant in a respectful manner and tell them that their behavior is disrupting the meeting. Ask if they are experiencing an emergency and if they need to leave. If they are not in an emergency, tell the participant if they could wait until the scheduled breaks to do what they have to do.

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| **Estimated Time** | 10 minutes |
| **Topic Objective** | Participants will identify steps to managing disruptions caused by frequent departures and returns by attendees. |
| **Topic Summary** | SIT provides a three-step technique on managing participants running in and out of your meeting. SIT stands for the following:   * Set expectations on this behavior * Incorporate frequent breaks * Timely feedback given to those who break this rule |
| **Materials Required** | Handout: SIT, Flip Chart |
| **Planning Checklist** | Prepare enough handouts for all participants  Have flip chart ready before lesson begins |
| **Recommended Activity** | * Have participants brainstorm ways to reduce the distraction of attendees running in and out of the meeting * Allow 2-3 minutes * Ask for volunteers to share their answers * Write their answers on the flip chart * Distribute handout |
| **Stories to Share** | None |
| **Delivery Tips** | The key to reducing this type of distraction is to set expectations, incorporate breaks, and provide timely feedback to those who break the rules. |
| **Review Questions** | Q: What are the potential results of participants constantly running in and out of your meeting?  A: Answers will vary. |

## Cell Phone and PDA Ringing

Most people know to silent their cell phones and PDA’s when entering a meeting. However, they may forget every so often. Your job as the meeting manager is to remind them. Here are a couple of steps you can take to remind your participants to turn off those phones.

* Place signs in the room instructing participants to silence their cell phone and PDA’s. They can be humorous and light-hearted. In any case, you will get your message across.
* Make an announcement at the beginning of the meeting instructing the participants to turn off their cell phone or PDA now. The signs are a back-up in case you forget to do this.
* Since the participants will most likely looking at the agenda, place a reminder there too. This way you have several areas where the participants can get the message.

One cell phone or PDA going off in the middle of the meeting could lead to a disruption that could last a couple of minutes. You can reduce this type of disruption by almost 100 percent by just mentioning it at the beginning of the meeting and providing reminder signs.

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| **Estimated Time** | 5 minutes |
| **Topic Objective** | Participants will identify verbal and non-verbal communication of a cell phone and PDA policy in the meeting. |
| **Topic Summary** | Using signs and a message at the beginning of the meeting will greatly reduce the disruption caused by ringing cell phones and PDA’s. |
| **Materials Required** | Sample sign |
| **Planning Checklist** | Prepare enough samples for all participants. |
| **Recommended Activity** | * Distribute samples to all participants |
| **Stories to Share** | None |
| **Delivery Tips** | None |
| **Review Questions** | Q: What are the potential problems that ringing cell phones and pagers present?  A: Ringer could be funny, startle other participants if too loud, and take time to silent due to cell phone or pager buried in a purse or jacket. |

## Off on a Tangent

This is by far the most difficult to manage in a meeting. The biggest challenge is to redirect without offending the participants. Using the **EAR** technique helps to do this in three simple steps.

* **Engage the conversation by becoming contributor for a moment.** The goal is not to carry the conversation, but to gain some control by getting the meeting floor. Once engaged you are able to go to the next step.
* **Acknowledge that the topic is valid and worthy of discussion.** This should be a short and affirming statement. This avoids embarrassment of those who carried the conversation when it is time to redirect.
* **Redirect the participants back to the conversation.** This brief statement ends the last discussion and starts up the previous one that was on topic.

Here is a sample **EAR** script:

**Participant on a tangent:** *I think pizza for breakfast is the best! There is now doubt about it.*

**Meeting manager:** *I am willing to try pizza for breakfast. It can’t be that bad.*

**Meeting manager:** *Perhaps you represent a large number of pizza lovers that enjoy the same thing you do. I won’t knock it until I try it.*

**Meeting manager:** *Now, let’s get back to the problem of employee morale in the call center. Who has some ideas they can share?*

Granted the topic was embellished, but this last script demonstrated the steps clearly. Using EAR will help you master the meeting room every time the conversation goes astray.

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| **Estimated Time** | 10 minutes |
| **Topic Objective** | Participants will identify ways they can re-focus the conversation when it goes off in a tangent. |
| **Topic Summary** | Using the EAR technique, the meeting manager is able to get the meeting back on track. EAR stands for the following:   * Engage the tangent conversation * Acknowledge the validity of the topic * Redirect the group back to the meeting topic |
| **Materials Required** | Worksheet: EAR |
| **Planning Checklist** | Prepare enough worksheets for all participants. |
| **Recommended Activity** | * Distribute worksheets to all participants * Instruct them to develop brief statements that support each of the elements of the EAR technique * Challenge participants to work on their own * Allow 3-5 minutes * Ask for volunteers to share their responses   Facilitator Note: Help participants develop some statements if they become stuck. |
| **Stories to Share** | None |
| **Delivery Tips** | EAR provides a systematic way to redirect the conversation back to the meeting topic. |
| **Review Questions** | Q: What are some of the signs when a conversation gets on a tangent?  A: Answers will vary. |

## Personality Conflict

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\FTRMPN7N\MC900054965[1].wmfSometimes a meeting could result in conflict. This may be true of meetings where new teams are storming together and forming the team. Conflict could arise when two participants with opposing views clash. In any case, conflict in a meeting has to be managed. There is an acceptable degree of tension, which is normal in debates. However, when the tension turns in to outright conflict, the focus turns from the meeting to the spectacle that is the conflict. Your job as a meeting manager is to diffuse the conflict and restore order in the meeting. Allowing conflict to go unchecked could fester into a bigger problem for everyone in the meeting. The news of the conflict will spread quickly and how you managed, it will be scrutinized. Here are three steps to take when conflict arises.

1. **Stop:** Stop the conflict by intervening and making a statement that acknowledges the conflict. Do not become frustrated yourself. Avoid taking sides. Never yell. Be professional and calm. Simply state that the discussion has turned personal and that it needs to stop.
2. **Drop:** instruct the parties in conflict to drop the discussion for now and regain their composure. There is no need to carry on if the discussion is counterproductive.
3. **Roll:** roll into a break. Even if you just got back from one, take a break and send the participants away for a moment. Call on the parties in conflict and hold a brief expectations meeting. You are not there to resolve personal conflict. However, you must manage the conflict because it is your meeting. Tell the persons in conflict that they must immediately stop the behavior. Restate the need for the meeting and that healthy debate is always welcomed. Have them agree to behave for the remainder of the meeting.

The meeting room is no place to try to resolve the deeper issues of the conflict. On the other hand, if the participants are all a part of a team that will meet regularly, then this issue has to be addressed in a coaching session and not in front of spectators.

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| **Estimated Time** | 10 minutes |
| **Topic Objective** | Participants will define the steps to resolving personality conflicts in a meeting. |
| **Topic Summary** | Remember to stop, drop, and roll when conflict arises in the meeting. |
| **Materials Required** | Handout: Stop, Drop, and Roll |
| **Planning Checklist** | Prepare enough handouts for all participants. |
| **Recommended Activity** | * Distribute handouts to all participants * Allow 1-2 minutes to review * Hold a brief discussion on handling conflict |
| **Stories to Share** | None |
| **Delivery Tips** | None |
| **Review Questions** | Q: What are some of the causes of personality conflict?  A: Answers will vary. |

## Case Study

Amanda set up a short, informal meeting with Opal, a long-time employee and excellent trainer, to talk about the learning journal that she planned to ask her participants to use after the training.

Amanda said, “I know that a learning journal is an excellent tool to have participants track their progress. I already know what I want them to record, and I plan to give out notebooks at the training. I just feel like this still isn’t streamlined enough.”

Opal asked, “What about check-in times with you or your supervisor to monitor how they are using the journals?”

“That’s a great idea.” Amanda wrote it down.

Opal said, “Also ask trainees to fill out the journals at the same time daily or weekly.”

“Thanks so much for your help,” Amanda said. “I’m sure this will make the evaluation a success.”

## Module Nine: Review Questions

1. What is SIT technique useful for?
   1. Keeping attendees on the meeting
   2. Keeping attendees’ attention
   3. Running in and out of the meeting
   4. Making meeting go faster
2. What is ‘I’ in SIT technique?
   1. Incorporate frequent questions
   2. Incorporate brainstorming
   3. Incorporate frequent breaks
   4. Incorporate frequent presentations
3. Which of the following is the best way to ensure that attendees will silent their cell phones and PDA’s?
   1. Place signs with instructions to silent their electronics
   2. Remind them about it in the agenda
   3. Tell them to do it at the beginning of the meeting
   4. The combination of all three
4. If you mention attendees to turn off their gadgets at the beginning of the meeting, you’ll reduce the chance of disruption by:
   1. 50%
   2. 75%
   3. 95%
   4. 100%
5. What is ‘A’ in EAR technique?
   1. Acknowledge the importance of the meeting
   2. Acknowledge that the topic is valid and worthy of discussion
   3. Acknowledge that any idea is worthy of discussion
   4. Acknowledge that each member has equally contributed when the meeting approaches to its end
6. EAR technique helps you redirect without:
   1. Losing time
   2. Offending participants
   3. Entering a new digression
   4. Making a new problem
7. What is the best thing to do if a conflict occurs?
   1. Ignore it and proceed with the meeting
   2. Intervene
   3. Call someone to handle it
   4. Let the conflicted attendees solve it by themselves
8. Which of the following is not one of the steps for handling possible conflicts?
   1. Stop
   2. Go
   3. Drop
   4. Roll
9. What did Amanda plan to suggest to her trainees to use, as presented in the case study?
   1. Learning journals
   2. Educational gadgets
   3. Flipcharts
   4. Power point presentations
10. What did Opal suggest to Amanda as an additional option?
    1. Tracking personal problems
    2. Tracking personal impressions
    3. Comparing different tracking
    4. Check-in times

# Module Ten: Taking Minutes

*Greatness is not a function of circumstance. Greatness, it turns out, is largely a matter of conscious choice, and discipline.*

***Jim Collins***

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\3YJGCFYP\MC900198209[1].wmfEarlier in this course, we discussed the important of the minute taker. In this module, you are going to learn the details of how to take meeting minutes. First, we are going to discuss the purpose of the meeting minutes. Second, we are going to discuss what to record throughout the meeting and finally, we are going to review a template that will help facilitate the minute taking process.

## What are Minutes?

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\31B2RP17\MC900089893[1].wmfMinutes record major points, decisions, and follow up actions that are a result of the meeting. Meeting minutes also help to keep the meeting on track, because it uses the agenda as its outline. Meeting minutes serve as historical data that can be referenced in case a dispute should arise. They are also used to set the topics for discussion in the next meetings. Many times people who could not attend a meeting ask for the minutes so they can be updated on the latest developments in the meetings.

The minute taker should not have a major part in the meeting themselves. They must focus their attention on what is being said instead of participating. With this said, the act of taking minutes does not require that every word that is said must be recorded.

When taking notes, avoid becoming bogged down with writing full paragraphs. Outlining your points will make your note taking more efficient. When you are done taking minutes, immediately proofread and send them to the chairperson and distribute to all the meeting participants. File your minutes for referencing later.

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| **Estimated Time** | 10 minutes |
| **Topic Objective** | Participants will be able to define the meaning of meeting minutes. |
| **Topic Summary** | Meeting minutes document the important information of a meeting. |
| **Materials Required** | Handout: Taking Minutes Summary, Flip chart |
| **Planning Checklist** | Prepare enough handouts for all participants  Have flip chart ready before the lesson starts |
| **Recommended Activity** | * Quickly go around the room and ask the participants to share what they believe is the function of taking meeting minutes. * Write their responses on the flip chart. * Do this for 1-2 minutes * Review list   Facilitator Note: Use Taking Minutes Summary handout for next lesson. |
| **Stories to Share** | None |
| **Delivery Tips** | Say, “Meeting minutes document the important information of a meeting.”  Allow 1 minute to review |
| **Review Questions** | Q: What are your thoughts about taking meeting minutes?  A: Answers will vary. |

## What do I Record?

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\9PDUOZYV\MC900212061[1].wmfMany times people think taking minutes is a daunting task because there is a belief that every single word must be documented. If this was the case, then all you have to do is use a recorder and you are done. Recording everything will only make the minutes useless. The idea is to record information about who attended this meeting, the results and follow up action items. Here is a list of items that should be recorded in the minutes:

* Date, time and place of meeting
* The goal or purpose of the meeting
* The chairperson’s name
* Action items assigned to someone for completion after the meeting
* Decisions made during the meeting
* Attendees present and not present
* Items that did not get resolved
* Items to discuss in the next meeting
* Items that were on the agenda that did not get discussed in the meeting for one reason or the other
* The meeting end time

Keeping to this short list will make taking minutes more efficient and useful.

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| **Estimated Time** | 10 minutes |
| **Topic Objective** | Participants will identify what items to record when taking minutes. |
| **Topic Summary** | Meeting minutes record major items and avoids getting into too much detail. |
| **Materials Required** | Handout: Taking Minutes Summary, Flip chart |
| **Planning Checklist** | Continue using handouts and flip chart |
| **Recommended Activity** | * Quickly go around the room and ask the participants to share what they believe should be recorded when taking minutes. * Write their responses on the flip chart. * Do this for 1-2 minutes * Review list |
| **Stories to Share** | None |
| **Delivery Tips** | The goal of taking minutes is to capture major items. |
| **Review Questions** | Q: What items must be recorded in your minutes?  A: Date, time, purpose, attendees present, etc. |

## A Take-Home Template

Using a template for your meeting minutes brings consistency to your technique. When you have a template, you can share it with some else, increasing the likelihood of getting similar results. Templates can be either electronic or printed. Incorporating a template for taking minutes also saves, you time by reducing the amount of time formatting the document for distributing to the meeting attendees.

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| **Estimated Time** | 5 minutes |
| **Topic Objective** | Participants will review a sample meeting minute template. |
| **Topic Summary** | Templates help to organize information and be consistent every time you use them. |
| **Materials Required** | Meeting Minutes Template |
| **Planning Checklist** | Produce enough templates for all participants  Be prepared to email an electronic version to all participants after class. |
| **Recommended Activity** | * Distribute templates to all participants * Allow 1-2 minutes for review |
| **Stories to Share** | None |
| **Delivery Tips** | Say, “Templates provide an easy way to organize your information while taking notes at a meeting.” |
| **Review Questions** | Q: What benefits do you have when you use templates as a tool for taking meeting minutes?”  A: Answers will vary. |

## Case Study

Chris seemed to be a in a great mood as he met with his supervisor, Rachel, at the end of the training’s evaluation period. Chris said, “Eight months is a long time to evaluate after a training. But we can see that it was necessary, and it provided excellent results.”

Rachel nodded, smiling also. “Don’t think you’re going to be done so soon though, Chris. At the end of an evaluation period, we need to take time to document what went well with our evaluation plan and also what we would do differently next time.”

The two of them sat down and asked themselves questions such as ‘What went well?’, ‘What could have gone better?’, and ‘What is one thing I definitely would not do again?’ to be ready for when they built their next evaluation plan.

## Module Ten: Review Questions

1. In which situations can you use minutes?
   1. In next meetings
   2. When some people cannot make it to the meeting
   3. In case a dispute arise
   4. In all of the situations above
2. What’s the best form of minutes?
   1. Outlined points
   2. Full sentences
   3. Full, but brief paragraphs
   4. Full and detailed paragraphs
3. Which of the following is not something minute taker must write?
   1. Date and place of the meeting
   2. General atmosphere
   3. Chairman’s name
   4. Present and absent attendees
4. Recording everything usually makes minutes:
   1. Great
   2. Professional
   3. Useless
   4. Satisfying
5. Using a template for your meeting minutes brings:
   1. The pressure of following strict rules
   2. Consistency to your technique
   3. Guarantee that you’ll do a great work
   4. Readymade solutions
6. Which of the following sentences is true?
   1. Printed templates are better than electronic
   2. Electronic templates are better than printed
   3. Printed and electronic templates are equally good
   4. Handwritten templates are the most efficient
7. Which of these questions is not something Rachel has recommended Chris in the previous case study?
   1. What went well?
   2. What could have gone better?
   3. What is one thing I definitely would not do again?
   4. What is the one thing that makes this great?
8. Chris worked on his training evaluation, as mentioned in the case study. What was Rachel’s reaction?
   1. She wasn’t satisfied
   2. She was extremely harsh
   3. She didn’t mentioned the time
   4. She mentioned the time, but also pointed out that it was necessary

# Module Eleven: Making the Most of Your Meeting

*We are the creative force of our life, and through our own decisions rather than our conditions, if we carefully learn to do certain things, we can accomplish those goals.*

***Stephen Covey***

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\9MJXCRQW\MC900283365[1].wmfMany times, meetings can be seen as boring events that people have to attend. That does not have to be the case. You can incorporate various elements into your meeting, which could make your meetings more interesting. Making the most of your meeting does not have to involve a lot of preparation. It just requires creativity and imagination. Let us learn some ways we can make our meetings fun.

## The 50 Minute Meeting

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\9PDUOZYV\MC900157093[1].wmfThe reason why meetings usually last an hour is that our computer program that sets up the meeting usually has 30-minute increments of time. We are forced to schedule meetings to last at least an hour. On a daily basis, we attend more 1-hour meetings than any other kind. When you have several meetings in a row that last an hour each, you will find that you do not have time to check your emails or do other things in between because the next meeting starts right on the hour. The 50-minute meeting is an effective way to space out meetings, allowing us time to do things in between meetings. Conducting 50-minute meetings takes discipline in time management. Here are four steps to make the most of your 50-minute meeting:

1. **Have an agenda:** We discussed the importance of having an agenda. The agenda is the document that outlines what will be discussed in a specific amount of time. With an agenda, you will have the group agree on what topics for discussion. Send out your agenda ahead of time so your participants get an idea of time spent on each topic.
2. **No side conversations:** Set the expectations with your participants that side-conversations are not allowed and that you expect them to be fully engaged in the meeting. Blackberries, iPhones, etc. are not allowed and express that you will hold them accountable if you see people looking under the table at such devices.
3. **Summarize actions steps:** At the end of the meeting, summarize any action steps that resulted from the meeting. You should have action steps at the end of the meeting. If not, rethink why you held the meeting in the first place.
4. **Send out summary notes:** This is the meeting minutes. This should be done as soon as possible after the meeting. Sending out the meeting notes is a great way to solidify those action items with the people responsible for doing them.

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| **Estimated Time** | 10 minutes |
| **Topic Objective** | Participants will identify how to run a 50-minute meeting. |
| **Topic Summary** | There are four simple steps to making an effective meeting in 50 minutes and they are the following:   * Have an agenda * No side conversations * Summarize action steps at the end of the meeting * Send out summary notes after the meeting |
| **Materials Required** | Meeting Minutes Template |
| **Planning Checklist** | Prepare enough handouts for all participants |
| **Recommended Activity** | * Distribute handouts to participants * Allow 1-2 minutes to review * Hold a brief discussion on this topic |
| **Stories to Share** | None |
| **Delivery Tips** | None |
| **Review Questions** | Q: Why do meetings have to last an hour?  A: Answers will vary. |

## Using Games

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\9MJXCRQW\MC900232237[1].wmfUsing games in meetings helps to increase productivity. Many games could be used in meetings. We recommend you research the bookstores and find a resource that outlines appropriate games you can use. Remember to think about the meeting purpose before you use a game. If the meeting is about budget cuts, then you do not want to use a game in that type of meeting. Meetings that form new teams or launches a new product is best suited for games. Furthermore, determine how much time the game will take to complete versus the entire time you will be in the meeting. You do not want to play a 15-minute game in a 50-minute meeting.

Here are some Do’s and Don’ts when it comes to using games at meetings:

**Do’s**

* Do use games from a book or legitimate resource
* Do use games for meetings that are meant to form new teams
* Do gauge the amount of time the game takes to play against the entire meeting time
* Do practice the game before you use it

**Don’ts**

* Do not use games in serious meetings
* Do not spend too much time on the game
* Do not make up a game of your own (unless you are confident you can pull it off)

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| **Estimated Time** | 10 minutes |
| **Topic Objective** | Participants will understand the benefits of using games at meetings. |
| **Topic Summary** | Using games appropriately in meetings could help to break the ice or energize your group, getting you more productivity form your meetings. |
| **Materials Required** | Handout: Meeting Games Do’s and Don’ts |
| **Planning Checklist** | Prepare enough handouts for all participants |
| **Recommended Activity** | * Distribute handouts to all participants * Allow 1-2 minutes to review * Discuss ways games help to increase productivity in meetings |
| **Stories to Share** | None |
| **Delivery Tips** | None |
| **Review Questions** | Q: What are some reasons for using games in your meetings?  A: Break the ice, energize the group, stress relief, etc. |

## Giving Prizes

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\FTRMPN7N\MC900191779[1].wmfPrizes in meetings should be used to reinforce positive behaviors. The prizes do not have to be extravagant. They could be pens, desk decorations, t-shirts, etc. When giving prizes away, be clear on how to win the prizes. Unclear instructions will lead to outbreaks of conflict when someone feels cheated. For example, if you announce that a person will get a prize for coming back from break on time, almost 95 percent of the time you will have some stay in the room and not go to break to win the prize. Make it clear that they have to leave the room. Perhaps you can up the challenge by stating that the person coming back to the meeting who is the closest to the break end-time without going over will win.

Here are some ways you can leverage prizes in your meetings:

* The most participation
* The first to arrive at the meeting
* Volunteering for something in the meeting
* Creative solution
* Who can recap the action items the best

There are no limits on how to use prizes at your meetings.

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| **Estimated Time** | 5 minutes |
| **Topic Objective** | Participants will understand the benefits of giving prizes at their meetings. |
| **Topic Summary** | Giving prizes away for specific behaviors increases productivity and keeps your meeting on track. |
| **Materials Required** | Handout: Meeting Prize Idea |
| **Planning Checklist** | Prepare enough handouts for all participants |
| **Recommended Activity** | * Distribute handouts to all participants * Allow 1-2 minutes to review * Discuss ways prizes help to increase productivity in meetings |
| **Stories to Share** | None |
| **Delivery Tips** | None |
| **Review Questions** | Q: What are some ways we can leverage using prizes in our meetings?  A: Give prizes for attendance, being on time, asking questions, coming back from break on time, etc. |

## Stuffed Magic

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\9PDUOZYV\MC900360029[1].wmfSimple magic tricks can help reduce stress and create a fun meeting environment. Before you start doing magic tricks in meetings, you will need to practice them at home. Magic tricks work well only when they are done right and with confidence. The setting up of the magic trick is the most important aspect. Do not be eager to do the trick or make an announcement. Be calm and natural. Incorporate it into the meeting seamlessly. You do not want to stop and announce you are going to do a trick. When participants are taken in by the trick without knowing, the effects are greater.

Research books and the Internet for magic tricks you can use. Practice the tricks and use them in the appropriate meeting settings. Try to avoid tricks that could embarrass others. You want to create an environment that is safe and offending someone could hurt that environment.

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| **Estimated Time** | 10 minutes |
| **Topic Objective** | Participants will understand the benefits of using magic in their meetings |
| **Topic Summary** | Magic tricks bring excitement to the meeting setting. |
| **Materials Required** | Two overnight envelops, Sticky notes |
| **Planning Checklist** | * Cut one overnight envelop so you only have one side of it * Trim the cut piece so it fits inside the uncut overnight envelope, creating two pockets in side * Place the set up envelop in the training room somewhere (you can place it in a wastebasket for more effect * Practice this trick several times before you attempt to do it in the class |
| **Recommended Activity** | * Ask participants to take a sticky note * Ask them to write their biggest concerns with using magic in a meeting and have them fold it * “Look” for something to collect the sticky notes in * “Find” the prepared overnight envelop * Open the envelop shifting the divider inside over so you can see the printed side of the cut envelope * Walk around the room and collect the stick note by having the participants drop them in the envelop * Make sure the overnight envelop is high enough so that the participants cannot see inside it. * Once all the sticky notes are collected, shift the divider inside the overnight envelop so that divider now hides the sticky notes. * Say, “When it comes to using magic in your meetings, I can make all your concerns go away. * Open the envelop and show the class that it is empty (remember to make sure that you are showing the side of the divider that is not printed)   Facilitator Note: You have to practice doing magic tricks before you can do them in a classroom setting. |
| **Stories to Share** | None |
| **Delivery Tips** | Using magic requires practice  Show class how trick works |
| **Review Questions** | Q: How can magic tricks help your meetings?  A: Answers my vary |

## Case Study

Harold and Tyler sat down for their meeting to plan how to execute measuring tangible benefits. Tyler looked at Harold. “Harold, you seem a little uncertain about why we’re having this meeting.”

Harold didn’t argue with him. “I just figure since we’re measuring profits and sales that the numbers will speak for themselves. We just need to gather data, right?”

Tyler said, “Well, when gathering these metrics, we want to make sure to gather information for a few months before and a few months after the time period that you are measuring, as well as data for the same time period in years previous.”

Harold said, “I suppose you’re right. It’s also important to account for external factors, like weather, economic conditions, and changes in the company, which could affect the data.”

They were mindful and clear about each point, and when they were finished, they felt confident in their plan.

## Module Eleven: Review Questions

1. Which of the following statements is true?
   1. On a daily basis, we attend more 20-minutes meetings than any other kind
   2. On a daily basis, we attend more 30-minutes meetings than any other kind
   3. On a daily basis, we attend more 45-minutes meetings than any other kind
   4. On a daily basis, we attend more 1-hour meetings than any other kind
2. What are summary notes?
   1. Notes taken by all attendees
   2. Minutes
   3. Chairman’s review
   4. Summary notes don’t have a precise definition
3. What’s the usual effect of using games in meetings?
   1. Decreased attention
   2. Too casual atmosphere
   3. Losing the track
   4. Increased productivity
4. When should you skip using games?
   1. In case of a serious meeting
   2. On large meetings
   3. When attendees don’t know each other well
   4. Whenever it’s possible
5. What type of prizes is recommendable?
   1. Extravagant and expensive
   2. Symbolic, like pens or desk decorations
   3. Serious, like a promotion
   4. Non-material, like accolades
6. Which of the following is the least functional goal for getting a prize?
   1. Creative solution
   2. Volunteering for something
   3. The first to arrive to the meeting
   4. Coming back from break right on time
7. Magic tricks work well only when they are:
   1. Original
   2. Silly
   3. Done right and with confidence
   4. Related to the meeting
8. What kind of magic tricks should you avoid?
   1. Card tricks
   2. Embarrassing tricks
   3. Complicated tricks
   4. Cliché tricks
9. What was Harold’s problem presented in the case study?
   1. He seemed too domineering
   2. He seemed too lost
   3. He seemed uncertain about why is he having the meeting
   4. He seemed unprepared
10. What did Harold suggest to the data?
    1. External factors
    2. Personal opinions
    3. Future predictions
    4. Expectations

# Module Twelve: Wrapping Up

*Endless meetings, sloppy communications, and red tape steal the entrepreneur's time.*

***James L. Hayes***

Although this workshop is ending, we hope that your journey to improve your Meeting Management Skills is just beginning. Please take a moment to review and update your action plan. This will be a key tool to guide your progress in the days, weeks, months, and years to come. We wish you the best of luck on the rest of your travels!

## Words from the Wise

* **Dale Dauten:** A meeting moves at the speed of the slowest mind in the room. (In other words, all but one participant will be bored, all but one mind underused.)
* **Ashleigh Brilliant**: Our meetings are held to discuss many problems which would never arise if we held fewer meetings.
* **Peter F. Drucker**: Meetings are a symptom of bad organization. The fewer meetings the better.
* **Wilbur Fisk**: The individual, who is habitually tardy in meeting and appointment, will never be respected or successful in life.

## Parking Lot

Review the items on the parking lot. Some items may need one-to-one participant follow up. You may be able to clear other items up now. Follow-up workshops may even be appropriate.

## Action Plans and Evaluations

Do a quick round robin and ask everyone to share one thing that they learned today. Then, ask participants to make sure their action plans and evaluations are complete.

If possible, ask participants to buddy up and set up a follow-up system, so that they can check up on each other in the coming days, weeks, and months. If appropriate, provide your contact information in case they have any questions.