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| **RUNNING SUCCESSFUL MEETINGS** |

Research carried out by Cardiff University found that there were **eight steps essential to the running of a successful meeting**:

1. Start on time - Don’t reward late-comers whilst penalising those who log in on time.
2. Stick to the agenda – Have agendas for all meetings, even impromptu meetings need them.
3. Keep on track - Timing agenda items allows you to know how well the meeting is progressing.
4. Control the discussion - Ensure everyone contributes and that the agenda is not high-jacked.
5. Agree decision making criteria - Make sure everyone can contribute to how decisions are made.
6. Summarise decisions – Summarise during the meeting with executive summary at the end. Make frequent summaries during the discussion.
7. Allocate action - Ensure everyone knows and records their agreed actions.
8. Finish on time - Agreed at the start of the meeting.

Use the points below as additional pointers to help you conduct meetings more effectively:

1. State the purpose of the meeting clearly on the agenda.
2. State ideas positively and show their relation to the overall issue.
3. Watch the pacing, keep it moving.
4. Find background information ahead of time or invite resource people to come to the meeting.
5. Get points of view by questioning or restating as you go along.
6. Stress co-operation, not conflict.
7. Assign tasks and delegate responsibility as the meeting proceeds. See that they are recorded in the minutes.
8. Guide the meeting from problem to solution.

**At the Meeting**

* Keep information items brief and relevant.
* Involve everyone who attends the meeting. Often newcomers are not recognised or taken seriously and then don’t contribute to future meetings.
* Establish the next meeting time and place. People should walk away from the meeting knowing when they will meet next.
* Hand out new task assignments. Be clear about who is doing what and what is expected of that person.
* At the end of the meeting there should be an executive summary of what the meeting produces. Good practice is for everyone at the meeting to give 1 or 2 things they have committed to doing. This will give you a good idea how successful your meeting was.
* Use your meeting summary as the meeting minutes so that everyone is clear about what will happen afterwards. Minutes should just contain the following listed in the table below. Circulate and update weekly to the team.

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| Agenda item | Agreed actions | Who responsible | Priority  1-essential  2-important  3-good to do | Time frame  Start | Time frame  Finish |
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**Chapter - One to one meetings**

One of the best ways to manage and maintain the performance and motivation of your team is to brief them initially and then keep in touch with them regularly. Carrying out one-to-one (1-2-1) meetings is one of the best ways that managers can stay abreast of what’s happening with the individuals in your team and offer the feedback and support necessary at the time.

1-2-1s carry multiple benefits for you including:

* + - * Being able to check in with your team members regularly improves the performance of the whole team
      * Establishes the best working practices and therefore prevents costly mistakes
      * You get to know them and helps builds a rapport
      * Helps managers to recognise the skills and weakness of your team member and the team as a whole
      * Allows managers to give feedback and support with more confidence
      * Reputation as a manager that ‘follows through’ encourages high quality work

The benefits for your team include:

* + - * Opportunity to acquire regular feedback on both progress and performance
      * Develops more confidence and competence as issues are discussed regularly
      * Chance to understand expectations required of them
      * Increase in motivation due to feedback and support offered
      * Opportunity to provide an input and have more influence and involvement in their work

**What’s involved in an effective 1-2-1**

Learning to conduct a 1-2-1 is similar to learning other skills and techniques. Having a structure helps to provide a set of guidelines on what is considered to be "best practice". There are no hard and fast rules that regulate this meeting but if you want to be successful in the future you need to master a fundamental approach. This approach forms the basis of an effective discussion.

**One - open the discussion**

**Two - explore the current** **situation and review the past**

**Three – set new priorities**

**Four - gain commitment**

**Five – offer support and close the discussion**

**ONE - OPEN THE DISCUSSION**

If done effectively it will help to build rapport, set the tone and establish the direction of the discussion.

1. Emphasise the positive and constructive nature of the discussion
2. Establish any ground rules, such as confidentiality, note taking etc.

If the opening is well managed, they will view the discussion as a positive and helpful event. TIP: always ensure both of you have a diary to record actions and follow ups

**TWO - EXPLORE THE CURRENT** **SITUATION AND REVIEW THE PAST**

In order to move forward, the first step should be to look back.

If you remember when you have been on the receiving end of effective feedback. What happened? Hopefully some of the following:

1. Review the progress and results of current priorities and activities. These should have been set from the last meeting (that’s why you both need a diary)
2. Jointly explore what is going well and why
3. Encourage them to assess their own performance by asking open ended questions
4. Help them identify if improvements need to be made or what could be improved
5. Analyse any current problems/issues thoroughly

By running the discussion along these lines there will be less likelihood that they will think you are *"out to get them"* and clam up as a result. By building on a positive opening you will have continued to establish the developmental nature of the discussion.

**THREE – SET NEW PRIORITIES**

This phase again needs careful handling. Here are some tried and tested tips to conducting this meeting

1. Try to use the review (stage 2) as a link to set new objectives ‘….to make that happen why don’t we set that as an objective this month?’
2. Encourage them to make suggestions to satisfy objectives
3. Help them to clarify ideas fully
4. Highlight any potential difficulties and resource implications
5. Make suggestions but try not to impose them unless you are at a critical point within the work

**FOUR - GAIN COMMITMENT**

What you have accomplished so far will have gone a long way to ensure that you will gain commitment rather than mere compliance. If you have generated too many choices, you will need to help them to narrow these down into a small number of workable choices.

To do this effectively you need to:

1. Focus on priority needs
2. Identify a specific development plan
3. Establish clear first steps on new items
4. Agree a monitor and review process

**FIVE – OFFER SUPPORT AND CLOSE THE DISCUSSION**

For the discussion to be handled effectively, it must come to a positive conclusion. This will be your final opportunity to emphasise the constructive nature of the discussion, and to ensure that both of you see it as a positive and helpful experience. The key points are that you should:

1. Check that everything has been covered and that they don’t have any further questions or concerns
2. Probe about their current morale and motivation
3. Ask them to summarise the main discussion and their action steps - summarise their own involvement in what happens next
4. Clarify and make a written note of when you will monitor and follow up
5. Thank them for their active participation in making the discussion such a success

**Running remote meetings**

There is a lot to think about when conducting a meeting. Well, there’s even more to think about if you want to run a successful remote meeting. Remote meetings depend on a group of people meeting from different locations using technology to meet and share ideas.

To ensure this type of meeting is successful more planning and logistical effort is needed compare to a traditional meeting.

**Logistics**

Ensure you have meeting software that everyone can use. There are quite a few that can be used easily and some cost nothing in their basic formats. Some worth mentioning are:

1. Cisco's Webex
2. Microsoft teams
3. Zoom.com

**Before the Meeting**

**Set clear goals**: determine what you want to accomplish during the meeting. This should be clearly defined for all participants and included in your agenda.

1. Write the agenda before the meeting and circulate to all attendees.
2. Write agenda items as questions to focus attention on answers not politics. This will also get the group thinking about the subject. Instead of ‘Agenda item; the next quarter’s target’, you could ask ‘Agenda item; what parts of the business should we focus on for a productivity increase of 5% next quarter’.
3. Write agenda items as ideas/action stimulators. Always good to ask group to give 2-3 ideas that they may include within each agenda point. Agenda item; Team building day - ‘I’d like everyone to think of a couple of ideas that could make the next team teaming more engaging’
4. Give each member of the team something to do at the meeting. This will involve everyone and take the pressure of the meeting chair to do all the talking. Ideas could include;
5. creating product or process champions to talk at the meeting
6. someone to generate ideas about new processes
7. attendees could collate data or information about a current product or process and deliver it at the meeting with insights or recommendations
8. Give each agenda item a time slot to get through all the information on your agenda. Ensure you stick the times given
9. Make changes to the agenda only with the consent of the group.
10. Make enough copies for all attending the meeting.
11. Set a predetermined ending time so everyone knows when it is due to finish. This will help the chair to control the timings of contributions.

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| **Meeting Planner** | | | | | | |
| **Meeting (Issue/Purpose):** **Chairperson:** | | | | | | |
| **Date: Start time: Finish time: Location:** | | | | | | |
| **Agenda Items** | | **Action Description/Responsibility** | | | By/When | Priority |
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| **Specific Results to be Achieved** | | | | | | |
| **By the time we finish this meeting we should have………...** | | | | | | |
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| **To Achieve These Results We Will Need:** | | | | | | |
| **These people** | | | **This information/material** | | | |
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| **Facilities/Equipment/Special Arrangements** | | | | | | |
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| **Meeting Evaluation** | | | | | | |
| **What went well** | **Problems to overcome** | | | **Solutions** | | |
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| **Date of next meeting: Start time: Finish time: Location** | | | | | | |

**Meeting scenario**

Bridges and Company plc is one of the UK’s leading organisations in the design, manufacture and sales of car parts and in-car accessories. It sells to the car owner via advertising, direct mail and increasingly via the web (where customers can order direct). Its core business sector has always been car accessories shops and garages and these have traditionally been serviced by field sales staff (25 in total). Head office is based on the outskirts of London within good access to the M25 and Gatwick airport. It ships goods throughout the UK and worldwide and has an annual turnover of £158 million. It was founded in the 1960’s and has benefited greatly from the boom in car ownership over the last 15 years.

An exploratory meeting was held 5 months ago with Keith Waterman, the MD and key members of the board of directors. The objectives agreed at the time were to assist Bridges and Company plc in identifying financing initiatives that will help to decrease costs and increase profit margins over the next 5 years.

Other issues discussed were:

* the company is in the process of new product developments that will hit the market in 6 months. These will place greater strain on their existing network
* the five year plan has set out a bold strategy of doubling turnover
* the MD has made a pledge to the shareholders that he would be held personally responsible for a phased reduction in operating costs
* the company is keen to exploit further markets within eastern Europe and the US
* part of the discussion focused on the future need for a new production plant within the next five years if expansion goes to plan

Nothing has happened since then but you have arranged a follow-up meeting with the board to discuss with them what your organisation would be able to offer them.

**Exercise**

* Using the strategy planner, plan your tactics for the meeting and finalise the items on the agenda in priority order

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| **Meeting Strategy Planner** | | | | | | |
| **Define the issue? What is the ultimate goal?** | | | | | | |
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| **What is the consequence of doing nothing?** | | | | | | |
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| **What do I need to achieve? What resistance/challenges might I encounter?** | | | | | | |
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| **What benefits will occur if my proposals are met?** | | | |  | | |
| **What concessions/compromises might I have to make to gain a strategic advantage?** | | | |  | | |
| **Who might resist and what are their fears?** | | | |  | | |
| **How will I deal with any potential difficulties?** | | | |  | | |
| **Meeting Summary/minutes** | |
| **Agreed actions** | **Who responsible** | | | **Priority** | **Completion date** |
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