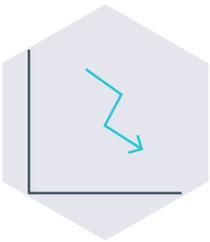


Effective Meetings

You would use this approach to improve the effectiveness of your meetings by understanding the time required, the business outcomes and improving engagement of attendees.

Projected performance gain



Reduced

- Time spent in meetings.

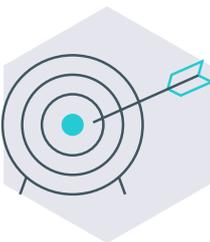


Improved

- Decision making which engages the whole team.

What investment is needed to understand the concept?

DIFFICULTY



Medium

It can be challenging to develop new habits, but the processes themselves are simple.

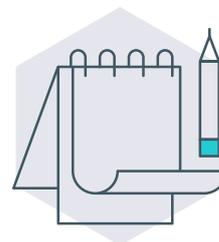
ACTIVITY



Team

This activity requires involvement from all meeting participants.

EQUIPMENT



Some

The meeting itself may be supported by use of flipcharts, whiteboards and other visuals.

Explanation of the concept

Meetings are called for many different reasons. Some are routine, some are designed for a particular purpose. This fact sheet will focus on planning and holding a meeting for a particular purpose, but you can apply the same thinking to developing a plan / terms of reference for your routine meetings.



Stockport based Wheatley Plastics running a meeting

The process of facilitating an effective meeting often falls to the manager or leader who has called it.

The role of the facilitator is to:

- Plan, guide and manage the meeting
- Ensure that the group’s objectives are met effectively
- Achieve clear thinking, good participation and buy-in from everyone involved.

In order to do this, the facilitator must create a process and an environment in which the group can flourish, and reach a successful outcome.

A useful tool for doing this is POOPP!

- Establish the **Purpose** of the meeting
- Then the **Outcomes** – what will be achieved by the end
- Followed by the **Objectives** – what will be done during the meeting
- Consider the **Practicalities and Preparation** required.

Use the examples on the right to consider your meeting process:

POOPP!

Purpose (“Why are we doing this?”)

To help build a culture of continuous improvement and problem solving, through developing the capability of individuals to lead, facilitate and coach this process.

Objectives (“What are we doing when?”)

- 09:00 Recap of the A3 Process & Tools
- 10:30 Look at the differing roles required - Doing, Facilitating, Coaching
- 11:30 Facilitation skills
- 13:30 Coaching skills
- 14:30 Reviewing A3 examples
- 15:30 Work on “assignments” for session 2 (Sept.)

Outcomes (“At the end of this session, we will have...”)

- Refresh of key tools required at each stage of the A3, a checklist to “complete” for each section
- Understanding of when the differing roles are required
- Learnt some facilitation and coaching skills.

Practicalities (“Think through the practical needs...”)

- Who needs to be involved?
- Where do we need to be?
- What working environment?
- What equipment is required?
- What data is required?

Preparation (“Get ready...”)

- Invite people
- Gather data
- Organise practical needs
- Ask participants to prepare / bring...

Develop a Terms of Reference (TOR) document

A TOR document outlines the plan for the meeting. Not only will it provide focus for the meeting organiser, but it will clearly communicate with the attendees what is expected of them. It will identify who needs to be at the meeting, and any input that is required from each attendee.

Components of the TOR include:

- Time and place of the meeting
- The purpose and desired outcomes
- The meeting owner and participants
- Required inputs and outputs
- Agenda.

A TOR template can be found at the end of this factsheet for you to use in meeting planning.

Additional techniques to consider

Agree the ground rules

These can be given by the meeting leader or better still created by the team if time and confidence in the group allows. Rules could include:

- Phones off or silent
- Listen to others
- Be open and honest
- Use appropriate language
- Give others the opportunity to speak
- Don't judge
- See the opportunities ahead – be positive
- Respect timekeeping.

Dealing with potential pitfalls

OVER-PARTICIPATION

Potential Causes

- Personal style
- Power play
- Experts.

Potential Tactics

- Preparation
- Ground Rules
 - “Make sure everyone has their say”
 - “Equal voice...”
- Name the problem
- Design process to prevent
 - Post-its
 - Thinking time / round the group
 - Split groups / feedback
- Space for experts
- Practice public listening
- Enforce the rules.

UNDER-PARTICIPATION

Potential Causes

- Personal style
- Previous negative experiences
- Lack of engagement
- Complex subject.

Potential Tactics

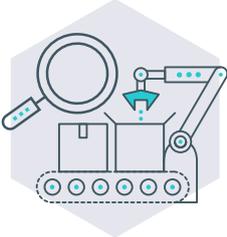
- Preparation
 - What do you want participants to bring / give?
- Design process for wide contribution:
 - Post-its...
 - Clear requests
- Check your own behaviour?
- Watch for “put-off” reactions
 - I hear what you say but...
 - Actions not followed up
 - Contributions not used
- Break down complex discussions into manageable chunks.

How to use this factsheet to make improvement?

- 1.**



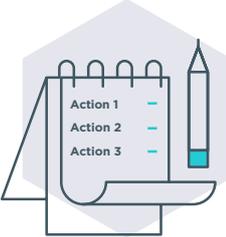
Identify an important meeting or workshop activity.
- 2.**



Go through the POOPP process and develop the TOR.
- 3.**



Consider the ground rules of the meeting.
- 4.**

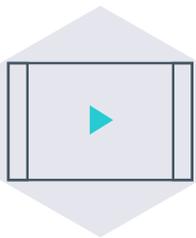


Identify potential pitfalls and develop strategies to manage these during the meeting.
- 5.**



Try it, note what goes well, what is difficult, and what can be learnt for the next time.

Recommended reading



Conducting Effective Meetings – A 3 minute crash course:

<https://www.youtube.com/watch?v=zfVX8IIQyGY>

5 Ways to Run Effective Meetings:

<https://www.youtube.com/watch?v=BAxYSt8L-yo>

Running Effective Meetings:

<https://www.youtube.com/watch?v=jtzXHre536M>



Woods, K. and Uden, I. (2007). Meeting Magic. Meeting Magic Publications
ISBN 978-0-9557788-0-3

Glossary

POOPP: Purpose, Outcomes, Objectives, Practicalities and Preparation.

Terms of Reference (TOR): Another name for a meeting plan or charter. A TOR template is available at the end of this factsheet for you to use in meeting planning.

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