**TIPS FOR RUNNING EFFECTIVE MEETINGS**

*[Organization Name] – [Facility Name]*

1. **Decide if a meeting is actually needed**

Most companies want to reduce time spent in meetings, but find it difficult to pinpoint when meetings are additive or not. Here are some guidelines.

Good reasons for having a meeting:

* Two-way communication is needed.
* You want to share an attitude or motivation.
* It’s time to explore a particular subject, get input or feedback from everyone present, and determine direction for the group as a whole.
* Collaboration between members of a group is needed to resolve complex issues.

These are **NOT** reasons to have a meeting:

* To give updates; if the flow of information is one way, send an email instead.
* To get participants on track; embarrassing or calling out people in front of their peers is always bad policy, so have a one-on-one conversation instead.
* To get everyone on your page; when there's disagreement about a project, approach team members individually and find out what they need to move forward.
* To create enthusiasm; motivation is a daily management challenge, not a one-time fix. If your team’s enthusiasm has waned, find out why in private conversations and address each person's issues separately.

Meetings usually fall into one of three categories, loosely based on duration:

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| **Quick meetings** | Last from five to 20 minutes. These short meetings address a simple challenge or group understanding and require a decision before ending. If you’d like to allow the team to express their perspectives in person, a short meeting with **clear constraints** is your best choice. |
| **Business meetings** | Typically last one or two hours spent exploring a specific, finite problem. They can result in either a decision or further clarification of the problem. |
| **Working sessions or workshops** | Have a duration of from two hours to several days. These intensive and carefully planned sessions address complex problems and unknowns in an open, collaborative manner. Outcomes include decisions, prototypes, strategic directions, project plans, etc. |

1. **Invite only the necessary people**

Once you’re certain a meeting is necessary, invite only those who can contribute and/or get something out of it: team members who work directly on the project in question, decision-makers with the power to move activity forward, or specialists with the insight and knowledge the group needs to fully understand an issue. If you want but don't need input from someone who may be overwhelmed with other work, let them know it's okay not to attend, but some decisions may be made without them.

Choose a location suitable to your group's size. For example, small rooms with too many people get stuffy and create tension.

1. **Define goals, create and distribute an agenda**

Every meeting needs a goal, so start by identifying what you want the meeting to accomplish. Having this goal in mind will make it easier to create a focused agenda. Then write the agenda, setting clear limits on how much time to invest in each topic.

How much time should you allow for each topic when you don’t know how a discussion will go? Obviously this is sometimes an estimate. Also keep in mind that changing topics every four or five minutes has been found to be valuable in keeping the attention of participants. As a general principle, make the meeting as productive, predictable and short as possible so those invited will be willing to attend.

Finally, distribute the agenda to everyone who is invited. Here’s an example:

**AGENDA FOR THIS WEEK’S ENERGY TEAM MEETING**

DATE/TIME: 3/11 at 1:00 PM

PLACE: Cascade Room

ATTENDEES: Bert C (organizer), Ernestine L, Fozwell B, Oscar G

GOAL: Schedule Internal Energy Audit

1:00 pm Intro—review goal of meeting, assign timekeeper, notetaker

1:05 pm Review—approved summary of areas to be audited (Oscar)

1:15 pm Discussion—upcoming production schedules (Ernestine)

1:25 pm Discussion—select 3 potential dates (Bert)

1:40 pm Action—Assign action items to prepare for audit

1:50 pm Action—Identify date for final selection of audit schedule

2:00 pm Adjourn

Include in the agenda everything your group will need to discuss or decide on. Keep it brief. Be clear about who will lead each agenda item and whether it's an update, a discussion, or an action item that requires group decision-making.

Email the agenda to the people you want to attend at least a day in advance—but not too much earlier—so anyone with objections will have the opportunity to discuss it with you privately rather than during the meeting. If necessary, you'll then have time to include their suggestions in a revised agenda. If there is a need for participants to be familiar with background material, lengthy documents or articles, send them in advance so they will feel prepared and involved.

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| **NOTE:** Always paste the agenda into the body of the email.  People often don’t bother to open an attachment. |

1. **Take charge and keep your meeting moving forward**

Before the meeting starts, make the room fit your purposes:

* If possible, arrange the room so that members face each other in a circle or semi-circle. For large groups, try U-shaped rows.
* Post a large agenda in front to which participants can refer.
* When possible, use visual aids (posters, diagrams, etc.) to increase interest.

Good meetings require good leadership. Take charge and make it clear you intend to make the meeting useful and relevant:

1. To get people to show up on time, start on time.
2. Write the meeting goal on the whiteboard to remind everyone why you are all there.
3. If you've asked people to do some kind of homework and they haven't done it, stop and reschedule the meeting. This avoids wasted time, and you'll send a strong message that preparation is not optional.
4. Enlist others to help handle the details. This makes the meeting run more smoothly and also engages coworkers who might otherwise stare out the window or pass the time reading their email. Some examples:

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| **Timekeeper** | Makes sure the meeting starts and stops on schedule, reminds facilitator when agenda items are going over their allotted time. |
| **Note Taker** | Records what was said and distributes minutes as needed. |
| **Whiteboard Wrangler** | Writes ideas on the whiteboard during brainstorming sessions and, afterward, records every idea whether or not it seems promising at first glance. |

Stick to the clock! If the conversation runs off topic, refocus the on the agenda.   
  
However, when a tangent turns out to be important, don't let the rest of your schedule go out the window. Decide whether it's worth pursuing and direct the conversation accordingly: "We're talking about a new issue — do we want to swap out one of our agenda items to continue discussing it?"

1. **Get the constructive input you need from everyone present**

The point of a meeting is two-way communication, so honest input and feedback from everyone is essential. It's your responsibility as leader to make sure everyone feels heard—the quiet and thoughtful people as well as the long-winded and passionate individuals; the ones who disagree as well as the cheerleaders.

* Encourage feedback. Ideas, activities and commitment to the organization improve when members see their impact on the decision making process.
* Use open-ended invitations to speak: "Oscar, you seem to know a good deal about what Ernestine just said. What are some things you would like to raise at this point?" Likewise, you can divert a conversation dominator with a neutral comment like, "Fozwell has made his opinion clear. Does anyone else have something they would like to add?"
* To build consensus or come to a group decision, be careful not to over-advocate your personal opinion or let anyone think the outcome is already certain.
* When it comes to brainstorming, avoid the temptation to dismiss ideas immediately or you may discourage the kind of creativity you want. Even ideas that seem crazy may have some value, so keep track of every idea, thank people for their input, and praise good ideas in front of the group. **Use a “Parking Lot”** (whiteboard or flip chart) for new ideas that come up during the meeting but maybe not be immediately relevant or could take members off-track. “Parked” items can be discussed at a future meeting.
* To help groups establish priorities on contentious subjects, ask a focused question and suggest people write down their ideas on sticky notes rather than speak them aloud. Post these notes in a shared viewing space. This way, each participant will have a chance to review the group’s full range of thought rather than reacting to the last thing that was said. It also levels the playing field between extroverts and introverts.

1. **Communicate the right attitude**

As a leader, be a role model by listening, showing interest, appreciation and confidence in members. Consider that the majority of what we say to others in a face-to-face encounter results not from what we say but from how we say it. Voice, body language, facial expressions, and eye movement are all critical not only in communicating your message, but in influencing the group dynamic and making everyone feel included. As leader, avoid eye contact with anyone who is speaking; if you look instead at other members of the group, you will encourage the speaker to do the same.

1. **Close With a Plan of Action**

Close the meeting with a review of decisions reached and the next actions. Everyone should leave knowing what's expected of them and when. End by asking everyone whether they thought the meeting was useful and, if not, what could be done better next time.

After the meeting, share the results and plans for what will happen next with the right people. Sending out complete meeting minutes may not be necessary, but make sure you have a system to keep track of what was decided and what assignments everyone agreed to take on. Then follow up and keep things moving.