Effective Meetings: Producing Results
Region VI/VII 2012 Spring Meeting

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Overview
Overview

- Develop a purpose
- Prepare for the meeting
- Conduct the meeting
- Follow up with action items
- Monitor action items
Develop a Purpose

• What is the purpose of the meeting?
  o Do you want a decision?
  o Do you want to generate ideas?
  o Are you getting status reports?
  o Are you communicating something?
  o Are you making plans?
Does a decision need to be made? Or a problem solved?

Democratic vs Autocratic decision making

Everyone who is invited should provide input

Hold meeting when a decision needs to be made (if possible)
Do you want to generate ideas?

- Make sure topic/issue is specific and focused
- Invite people from different areas of expertise
- Be careful about mixing management levels
- 40 minute meeting (people get tired beyond that)
- Write ideas on a white board
Status Update Meetings

• Are you getting status update reports?

• Make sure the transfer of information goes both ways
  
  o Detailed review of project/topic
  
  o Identify potential issues

• Only invite those that have something to contribute
Informational/Educational Meetings

• Are you communicating something?
  
  o Again make sure information flows both ways  
    (otherwise you can email it)

  o Have your statement prepared and be concise

  o Give people the opportunity to ask questions and/or provide input
• Are you making plans?

• Have an objective/mission and timeline

• Give people a chance to contribute items for the agenda and feedback

• Be ready to consider logistics
Preparation
• Forum
• Who to invite
• Length
• Where are people coming from
• What information to send ahead of time
• What do you need to bring
• How much lead time
• Agenda items
• Identify meeting leader(s)
• Presentation methods
• In-person
• Teleconference
• Web-based meeting
• Video conference
Attendees - who to invite:

- Invite key players
- Attendees should contribute
- Prior to meeting:
  - Notify attendees of purpose and desired outcomes
  - Set expectations with presenters
  - Identify the note taker
• Depends on type of meeting

• Always let attendees know how long the meeting will run

• Do not run over time

• Better to over-estimate length
Ideal Length of Meeting

![Graph showing the ideal length of a meeting with a peak at "Your Ideal Meeting Length" between too short and too long lengths.](image_url)
• Make preparations for people coming from another work site, out of town, etc.

• Provide:
  o Detailed directions
  o Campus map
  o Where to park
  o Who to call if they get lost
• Assist with travel arrangements and/or accommodations if someone is coming from out of town, if needed

• Provide suggestions for dining, things to do (as appropriate)
What information to send ahead of time

- Location (reserve room as needed)
- Agenda items
- Documents that will be discussed or reviewed at the meeting
What do you need to bring

• Coffee (or tea, water, etc) for yourself
• A notebook
• A pen
• Meeting materials
• How much lead time do you need?
  o Standing meetings
  o Urgent meetings

• Some meetings may be called the same day (urgent), others make take months of planning
Meeting Agenda

• Create Your Roadmap – Agenda
  o What is the purpose of the meeting?
  o What outcomes are needed?
  o Is the meeting really necessary?
  o What key points should be addressed?
  o Are supporting documents needed?
  o Identify meeting place and time
## Agenda Checklist

**Meeting Purpose:**

<table>
<thead>
<tr>
<th>Topic/Item</th>
<th>Time allocated (minutes)</th>
<th>Topic Leader</th>
<th>Objective (Choose one)</th>
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• Must identify meeting leader/moderator/facilitator(s)

• Be sure this person can attend the meeting

• Identify back-ups
Meeting Leader Checklist

Meeting Leader Checklist
Use this checklist before and during your meeting to ensure you maximize your meeting effectiveness.

Create a Roadmap for Your Meeting
- Define the purpose of your meeting.
- Identify specific outcomes needed to drive business results.
- Invite the right people.
- Set expectations with presenters.
- Develop a meeting agenda.
- Give advance notice.
- Arrange room, equipment and refreshments as needed.
- Define the meeting methods to be used.

Conduct the Meeting
- Start on time.
- Welcome and introduce participants.
- Review ground rules.
- Follow your agenda.
- Keep a “Parking Lot.”
- Promote participation in discussions and decisions.
- Have the recorder list issues, ideas, decisions and actions in a visible place.
- Apply problem solving and decision making tools.
- Manage time.
- Address disruptive behavior promptly and constructively.
- List action items.

Confirm the Results of Your Meeting
- Review the “Parking Lot” and establish the next meeting topics, time and place.
- Confirm and assign action items, owners and due dates.
- Make a plan for following up on action items.
- Debrief the meeting.
- End the meeting on time.
- Take recorded pages down and clean up meeting room.
- Assure that meeting minutes are compiled and distributed.
Conducting the Meeting

Conducting Effective Meetings

By: Romains Bos
Conducting the Meeting

- Start (and end) on time
- Welcome and introduce participants
- Ground rules
- Review agenda and set priorities
- Encourage discussion/feedback
- Develop parking lot list for non related meeting topics
- Minutes will include results and action items only
• Arrive early

• Arrange the room if necessary

• Know how to control the lighting and temperature in the room

• Begin on time

• Distribute handouts

• Introduce members if not familiar; introduce visitors

• Run the meeting
- Space matters!
- Attendees must be able to easily see one another
- Room should be a comfortable temperature
- Adequate space for planners, notebooks, or laptops
- People should be able to easily hear the discussion
- If it is a large group, speakers should consider standing
- Schedule breaks, if it is a long meeting
Meeting Room Arrangements

• Theater Style
  
  o Leader has great power by position

  o Participation and interruption by audience is limited
• U-Shaped Style
  o Equality of membership
  o No doubt of who the leader is
  o Good visibility for visual aids
Meeting Room Arrangements

• Circle Style
  - Democratic: equality is stressed
  - Great visibility by participants
  - Obvious body language
  - Excellent participation
• Set ground rules:
  o Start on time. End on time
  o Everyone participates
  o Different opinions are welcome
  o Silence is agreement
• Set ground rules:
  o Disagree in private; unite in public

  o Questions should be asked for clarity

  o Stick to agenda

  o Follow through on action items
Ground Rules

“I think these face-to-face meetings are so important, don’t you?”
Ground Rules

• Set ground rules:
  o Cell phones/pagers should be silent or off
  o Electronic communication is disallowed
  o Opinions of participants should be respected – don’t interrupt
  o One conversation at a time (no side conversations)
• Attempt to identify & understand interpersonal dynamics of the group

• Stick to the ground rules
• Balance participation
  
  o Meetings will have people who are silent, vocally dominant, or negative
  
  o The facilitator/leader as well as members of the group can redirect this unproductive behavior
How to Deal with Disruptive Members

• Members who are vocally dominant
  o Redirect discussion to other members
  o Ask others directly for input

• Members who are negative
  o Probe the negativity to validate concerns
  o Redirect discussion to other members
  o If behavior persists, consider speaking off-line or excluding them from future meetings
• Allow time for process and group development
  
  o Checking off agenda items in a rapid-fire is not productive
Encourage Discussion

• Ask open-ended questions
  o “Who can add to this?”
  o “What else might be possible?”

• Allow people to express themselves (in a constructive manner)
• Park items that are off topic to be discussed in the future
  o Make it visible (white board, flip chart)
  o Assign someone to record
  o Encourage people to place items on the list
  o Review and assign people to tasks at meeting end
During the Meeting

- Control interruptions
- Identify and record results
- Assign responsibilities for follow-up
- End on time
- Thank participants for their input and reinforce the importance of outcomes on the organization
Follow-Up Items

• Distribute Meeting Minutes
  o Within 2-3 days
  o Include action items assignments

• Follow up on Action Items
  o Recognize timely progress
  o Unfinished business

• Meeting Evaluation
  • Periodic review
Don’t Read to the Group

- Place emphasis on processing information, than on giving information

- A meeting is a place to discuss an issue
• Everyone contributes to a meeting’s success
  o If the material covered is not relevant to some people, arrange to have them excused from that portion of the meeting
  
  o Make sure all meeting participants understand their responsibilities
• Praise!
  o Praise people twice as much as you criticize
  o Don’t let any good deed or action go unheralded
  o Say thank you publicly at every meeting
  o Recognize the value of peoples’ contributions at the beginning or within the meeting
  o Meeting planning and organization is the primary mechanism for running effective meetings

  o For each agenda item, make sure the group is clear about the goals, processes, and functions
Technology

• Use Outlook to send invite/remind about meetings
• PowerPoint (web-based alternatives such as Google Docs, SlideRocket, etc)

“In order to be irreplaceable one must always be different.”

- Coco Chanel (1883 - 1971)
• Evernote (App for taking notes)
• Teleconferencing
• Web-based
  o Web-Ex

Create a training concept that each organization is going to implement
Decide on how to share results and disseminate them
decide where we are going to share the results and how - who we invite to the trainings
to have final form of leaflet
could be to create a toolbox for international projects

A training curriculum
decide what are the actual final results of this project
• Video conferencing
  o Institutional set-up
  o Google Talk
  o Skype
Useful Websites

- http://www.mindtools.com/
- http://workawesome.com/
- http://markhughes.typepad.com/insights/
Contact us

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• Samantha Eells – seells@labiomed.org
Any questions?

• Thank you!!!