

THE MEETING PROCESS

Setting Up

The preplanning and thought that precedes the meeting. Determine the who, what, when, where, why, how many. It is extremely important to determine the desired outcomes you, as a leader, need from the meeting. If you are unclear of the “why” for the meeting, how can the participants understand the purpose for the meeting.

Checklist for Setting Up: *(Adapted from Mastering Meetings for Results, Interaction Associates, Inc.)*

- Determine the purpose and the type of meeting
- Assess the context of the meeting and who the key stakeholders are
- Decide who will attend and the roles needed for the meeting
- Determine how decisions will be made
- Reserve appropriate room and equipment
- Decide on seating arrangements
- Identify potential problems that could arise and strategies to handle them
- Design an agenda
- Send out memo announcing the meeting and an agenda to attendees
- Make charts\PowerPoint hand-outs
- Visualize a successful meeting
- Arrive at the meeting room early to double check the room arrangements and lay out prepared materials as necessary

Conducting the Meeting

During the meeting, the leader, the facilitator, and the group acts as a team with a focus on the desired outcomes. Continue to educate the group throughout the meeting. Use facilitative techniques to keep the meeting moving.

Checklist for conducting meetings:

- Start on time
- Get agreement on desired outcomes, agenda, roles, and ground rules
- Match participant expectations with agenda
- Clarify decision-making method
- Clarify/explain any constraints that may limit solutions
- Keep the meeting on track by getting process agreements
- Summarize what has happened periodically during the meeting
- Avoid process battle
- Listen as an ally
- Ask open-ended questions
- Encourage participation
- Suggest a process or tool when needed
- Protect others from personal attack
- Use the group memory
- Conduct a meeting review to assess what worked and what needs improvement

Following through

At the end of the meeting, the actions are reviewed and a plan is developed to implement the decisions made during the meeting. There should be an evaluation of the meeting. What worked; what needs improvement. Based on this information, future meetings can be improved.

Checklist for following through:

- Ensure that recorder prepares group memory for typing
- Prepare and distribute minutes, including agreements made and actions to be taken
- Use meeting review to make improvements for subsequent meetings
- Make sure unresolved issues get addressed. Distribute to other groups as appropriate
- Collect and offer additional feedback to meeting leader, members, recorder and facilitator to enhance effectiveness
- Follow through on action items
- Acknowledge accomplishments