Communicating in the Workplace

Administrative Accounting and Bookkeeping Program

Handout: Effective Meetings

As a synchronous group communication channel, meetings are a great way to check in with a whole group, get feedback, bring a team up to date, coordinate next actions, and make group decisions.

Even the best meeting, though, costs you in person/hours. A half hour meeting doesn't just take half an hour out of your day, it also takes a half hour of every participant's time. So, meetings do need to be both purposeful and efficient if they're to be worth the time they take.

In my experience, most business meetings are not particularly purposeful, and they're not run well. And, because ineffective meetings breed yet more meetings (since they didn't accomplish their purpose) too many office workers nowadays are wasting too much of their work time in endless meetings.

As with email, the problem isn't with meetings themselves, but with the fact meetings are being misused or conducted badly. So, the answer isn't to try to avoid meetings, but to make sure yours are effective, efficient, and purposeful.

Here are four (relatively) easy steps for doing this:

1. Have a Clear Purpose

Every meeting needs to have a clear purpose, expressed in terms of the outcome you want to achieve. Otherwise, cancel the meeting. It's helpful to think of the different types of meeting when clarifying your purpose. They can be categorized in a couple of different ways.

By Time

Standing Meetings: Are regularly scheduled meetings, such as your team meeting. They are a great way to keep up to date with your direct reports and facilitate collaboration within the team. With standing meetings you should ensure:

- They should be held on the same day at the same time every meeting so that they become part of the participants' routine; and
- They should be immediately cancelled if they're not needed (too many members of the team away or no new items to discuss).

Ad Hoc Meetings: Are scheduled as needed. The main consideration here is that they should only be scheduled when there's a clear need for them. What is the meeting's purpose? Think of this in terms of outcomes. What do you want to come away from this meeting with, and is there a better way to accomplish it?

By Purpose

Informational Meetings: Typically include staff gatherings to pass along the latest news. In organizations where the bosses like to hear themselves speak, these can proliferate, with overlapping meetings for different employee groups. Given that the time cost of meetings goes up with every participant you add, and that informational meetings tend to be large, including the whole staff, organizations should try to consolidate and reduce the number of informational meetings. They should also be reserved for news where leaders feel the need to put their emphasis on the important elements; in which case the meeting becomes largely a presentation. If the information meeting doesn't need this personal touch, ask whether it could be replaced by an email, a newsletter item, a bulletin, or an article on the website?

Working Meetings: Are meetings, such as the team meeting described above, in which the purpose is to collaborate on a decision or work together on a problem. In these meetings you need to be careful to only include needed participants to keep the size of the meeting manageable. Any more than seven or eight makes it difficult for everyone to participate meaningfully and contribute to a decision.

2. Preparing for the Meeting

Agenda

Moreover, every meeting needs to have an agenda. For small or informal meetings this can just be an email to the participants. Regardless of how simple the agenda, or small the meeting, you *must* issue an agenda at least one day before the meeting, so participants have time to prepare.

Include the following information on the agenda:

- Date of the meeting.
- Start time of the meeting.
- Location of the meeting.
- Name of the meeting's chair.
- List of agenda items to be discussed, with a sponsor's name for each.
- A "No later Than" time to end the meeting.

Note 1: I like a "No later than" time for ending the meeting because the Chair should always end a meeting as soon as its business is done. So, the end time is flexible, with the "No Later Than" time merely being the point at which you have to stop and let people go — even if you haven't finished all the agenda items. You have to respect people's time, as they may have other activities scheduled right after the meeting. (I wouldn't have thought it necessary to make this point, except I've attended more than one college meeting where we finished all our business before the end time and — instead of sending us away — the Chair asked if there was anything else we'd like to chat about!)

Note 2: Finally, remember that the purpose of the agenda is to allow meeting participants to prepare: update themselves on any issues they're speaking to, and gather any references they need. If your teams fails to do this before a working meeting, then they're unable to contribute meaningfully to the decisions you need to make. In which case, don't be afraid to cancel the meeting. Rather than flounder and waste people's time, just say: "We're obviously not ready to discuss this right now. We'll reconvene at (date and time) when you're prepared".

3. Chair the Meeting

Role of the Chair

A good chair makes all the difference to a meeting's effectiveness. It is not the Chair's role to dominate or even lead each discussion. Rather, they are there to keep the meeting on track and on topic, ensuring that everyone has a chance to contribute while no-one dominates the meeting or wastes the participants' time.

A good chair:

- Starts the meeting on time.

- Reviews the agenda and ensures everyone is clear on the topic/purpose of the meeting.
- Ensures that minutes or a record of decisions is kept.
- Introduces each topic.
- Ensures everyone who wants to speak, gets a chance.
- Politely but firmly keeps the discussion on topic, assigning digressions to sidebar discussions or a future meeting.
- Summarizes the conclusions/points from each topic before moving on to the next agenda item.
- Ends the meeting on time.
- Thanks the participants for their contributions.
- Reviews the minutes/record of decisions before they are distributed.
- Ensures these are sent to all participants and anyone else who needs to know.

Essentially, a good Chair demonstrates their unit's culture and values in everything they say or do.

An Anecdote: *As a very junior Army officer, I was once assigned the unloved duty of being my Squadron's representative on the Regimental WHMIS Committee. The "Workplace Hazardous Materials Information System" is a Canadian safety requirement for any workplace that includes hazardous materials. Since I belonged to an Armoured Regiment with tank hangars and heavy vehicles, we handled plenty of hazardous materials, indeed. Even so, monitoring our WHMIS compliance was one of those tiresome secondary duties that young armour officers wanted to avoid or — at least — spend the minimum amount of time on.*

I soon learned, though, that the Committee included a couple of WHMIS nerds who had read all the manuals and who were all too ready to hijack the meetings to show off their specialist knowledge. Perhaps this was their one chance to be the centre of attention. Shortly after I joined the Committee, our new British Exchange Officer arrived and, before he could learn any better, he was appointed the Chair. He promptly started to give a master class in how to run a meeting.

He always issued a clear and up-to-date agenda, at least two days before every meeting. He started the meetings bang on time, whether everyone was there or not. And, though he *didn't necessarily talk a lot himself, he guided us through the agenda with a friendly fairness that was utterly firm when it came to keeping everyone on track.*

Once, one of our WHMIS nerds tried to hijack the discussion so he could ramble on about one of his favourite hobbyhorses (hazardous spill clean-up). Before he could get going, however, our British Chair very politely stopped him and said: "Thank you, Bill, that sounds very interesting. However, I notice it's not on our agenda and I do want to be respectful of everyone's time. So, we don't really have time for it right now. But, if you'd like to email me, I could put it in the agenda for next meeting."

And we carried on to the next agenda item as though the interruption had never happened. Our WHMIS nerd looked as though he didn't know what had hit him, while the rest of us silently cheered. We did, indeed, finish on time — with all our business successfully completed. And, later that day, the record of decisions arrived in my inbox.

That's how you chair a meeting!

4. Follow Up After the Meeting

Minutes / Record of Decisions

Just as every meeting needs an agenda, it's *essential* that you issue some sort of minutes or a record of decisions after a meeting. For larger and more formal meetings the Chair should assign a secretary to take notes and prepare the minutes (the Chair will be busy chairing). For smaller and less formal meetings the Chair can often take their own notes and issue a simple record of decisions.

Without some sort of written record, though, your meeting was a waste of time. I mean that. Without minutes or a record of decision, there's no reference for your action items and no accountability. Participants can walk away with their own spin on how they remember any commitments made. So, you *must* issue at least a basic record of decision after every meeting, if not full minutes.

For smaller or less formal meetings this can in the form of an email with the following bullet points:

- Meeting name.
- Meeting date and time.

- List of participants.
- List of decisions made.
- List of tasks for follow-up, with the name of the person assigned and the date it's due.

Note 1: Issue your records of decisions even quicker by making a template with the above headings.

Note 2: Remember that an assigned task is not a task at all unless it includes three things:

1. the action to be accomplished,
2. The person assigned, and
3. A due date.

Video (Zoom) Meetings

The points above are equally relevant to video meetings, but there are a few additional considerations when the meeting is held online. Video meetings tend to be more stressful and fatiguing than face-to-face ones because everyone's zoomed-in face is front and centre on the meeting dashboard; you can't relax at the end of the table when someone else is speaking.

You can make online meetings less fatiguing by:

- Letting people turn off their cameras and mute their microphones when they're not talking.
- Bringing guests in only for the topic they're needed and letting them leave afterward.
- Scheduling a break for long meetings.
- Following the Meeting Manifesto guidelines below (especially if, by not holding the meeting, you can just send an email instead!).

A few other tips for video meetings:

- Ensure you have a good webcam and microphone,
- Arrange good front lighting on your face.

- If you can’t control the appearance of the room behind you, use an image background if your software supports this.

Finis: A Meeting Manifesto

- Only call meetings that have a clear and necessary purpose.
- Only invite participants who are absolutely needed.
- Always have an agenda and distribute it to all participants at least a day prior.
- Ensure all participants are prepared for the business of the meeting; cancel if they are not.
- Always start meetings on time, even if — especially if — not everyone is present.
- Corollary: always end meetings on time, even if you haven’t finished the agenda.
- As Chair, encourage collaboration while keeping the meeting on track with the agenda.
- End meetings early, if all your business is done.
- Be quick to cancel meetings when they are no longer required.
- After a meeting, distribute written minutes (or a record of decisions) to all participants.
- Ensure all action items have both an owner and a deadline.
- Don’t be afraid to experiment with stand-up or walking meetings.
- Be an effective Chair (firm, fair, and friendly!).