

# Vanessa Wilkinson

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### How to plan and run an effective meeting

Many of us have to hold meetings to get business done. We've probably all been in badly run meetings in which we may feel our time has been wasted, we haven't come to any conclusions, we didn't cover all the business, not everybody participated or someone hogged all the airtime, or after which agreed actions have been lost and forgotten.

If we want to move our business forward, in the most time efficient way, there are some things we can do to make our meetings more effective. By following the tips below, we can make sure

- we achieve what we need to;
- everyone participates and has a sense of ownership for the actions;
- we use time wisely (our own, and that of others);
- we make things happen;
- we gain respect, and therefore further participation when we need it in the future.

We need to consider what to do when planning and preparing, then at the meeting and after the meeting.

### Planning

#### **1. Ask yourself some key questions:**

##### **What do I want to achieve ?**

Make a list of topics and outcomes.

For example:

Office refit: agree task list and assign tasks to people/teams.

Marketing: get new ideas for marketing strategy for me to go away and think about before deciding on action.

Try to avoid using meetings solely to share information unless

- it is sensitive and needs the opportunity for questions to be asked/answered personally,
- is an opportunity to make sure everyone is given the same message;
- is motivational in purpose;
- it is a management meeting, in which case exceptions only (i.e. things not going well/to plan) should be reported.

Otherwise, it is best to circulate information separately, and save discussion and decision-making for meetings. This is a better use of everyone's time.

##### **Who are the people I need who have the relevant information and/or decision-making power ?**

Identify all the people you need to achieve your outcomes in the meeting. (If you find more than 12, you may be into "workshop" territory, which needs a different approach not covered here.)

### **How long does the meeting need to be ?**

Most productive meetings take 2 hours or less. Board meetings may possibly extend a little. Much more than this and you are in “workshop” territory again. If you do take 2 hours or more, consider having a short break half way through, even if you have to extend by 15 minutes.

Make rough timings, based on your topics and outcomes list, and if it won't all fit, prioritise and plan a second meeting.

### **2. Set your agenda....based on your topics and outcomes list.**

It can help everyone in the meeting if you publish your rough timings in the agenda.

Put urgent items at the top. Allow some “easy “ items between difficult ones.

### **3. Set your meeting date and time**

- a) It is wise to go to your participants and ask them to indicate their availability for several different date/times. This way you can ensure everyone you need is available. Give them plenty of notice.
- b) Share the draft agenda so they can see why they need to attend.
- c) When setting the meeting start and end time, consider people who have to travel – you will not get the best out of them if they have been up at 5am or are worrying about when they will get home.
- d) Make it clear whether deputies are acceptable if your invitee is not available, but if they are offered, you need to check they are qualified:
- e) Will they have the appropriate information ?
- f) Are they authorised to make the necessary decisions in the meeting ?
- g) At this stage you could also ask for comments on the agenda.

### **4. Find a meeting location**

- a) This needs to be separated from day to day activity, so your participants can concentrate. Even a partition can help, if a separate room is not available.
- b) It should be quiet enough for everyone to concentrate and hear each other.
- c) Distractions should be minimal.
- d) If the topic is confidential you will need a sound-separated space.
- e) If your participants are travelling from various places, consider a central location, or rotating for multiple meetings so that the same people do not have to travel all the time.

### **5. Confirm the date, time, location, participant list and agenda**

- a) Send out the final details to everyone as far in advance as possible (You may send the date/time details out earlier than the rest).
- b) Tell people what they need to bring, and anything they need to prepare.

### **Preparation**

1. Decide and agree who will chair the meeting and take the minutes (if not you).  
(If you are dealing with an emotive subject on which you have your own strong views, consider an independent chair).
2. Ask the minute-taker to schedule time to write up the meeting, preferably within 24 hours afterwards.
3. Check all participants have confirmed their intention to attend.
4. Book the meeting venue. Plan the furniture layout and any refreshments needed.
5. Plan for any special media e.g. whiteboards, computer projection, stationery.
6. Get to the venue early to ensure everything is set up and works correctly.

## At the meeting

1. Set the ground rules:
  - Mobile phones off or to silent and accept emergency calls only.
  - No doing email during the meeting.
  - Everyone has the right to express their opinion without being interrupted.
  - Introduce the chair and minute-taker.
  - Make it clear that participants are responsible for noting details of their own action items, and starting them as soon as the meeting is finished.
2. Start on time.
3. Ensure everyone contributes. Make a point of asking quieter members for their view. Look out for negative or defensive body language which can indicate underlying issues. Encourage open discussion (no threat of disapproval). Be aware of power imbalances.
4. Stick to the point – put other things aside. If they are real sticking points for someone, start a “fridge” – a visible list of items to be addressed outside the meeting.
5. If only a sub-section is interested/involved in a particular discussion, record an action for them to follow it up after the meeting.
6. Ensure any decisions are recorded.
7. Ensure where action is necessary a clear action is agreed, one person is assigned to lead it (even if more than one is involved), and a realistic target date is agreed for completion.
8. If time is running out on an agenda item, decide what to do:
  - continue with it and move a lower priority item to the next meeting, or
  - agree actions and decisions as far as you can and come back to it at a later date.
9. Finish on time.
10. At the end, summarise conclusions and tell people you will circulate minutes.

## After the meeting

1. Write up the minutes. Not every word, but key information which is relevant to decisions, actions or to later work. State actions, who responsible (who helps) & target completion.
2. Take 10 minutes to think about how the meeting went; what worked well and what didn't ? What would you do the same/differently next time ?
3. Follow up progress on the actions, either by contacting participants individually, or by using the minutes as a checklist at (or prior to) the following meeting.

## Summary

If you use these tips, you should see the benefits outlined (and more). Your confidence will increase and next time it will be easier !

If, however, you do not find it easy to work in a structured way, consider bringing in a colleague who is, or an independent facilitator who can work with you to do the planning and preparation, then chair and take the minutes on the day.

If your meeting looks bigger than you anticipated, then you may need to take a “workshop” approach. Again, an independent facilitator can help you to do the necessary planning and preparation, also assisting on the day.

If you would like any advice or information relating to this topic, please contact Vanessa Wilkinson.