

Business and Professional Meetings

by Sophia



WHAT'S COVERED

In this lesson, you will learn about meetings as an important part of the communication climate of any business, and how to best plan for them. Specifically, this lesson will cover:

1. Preparing for the Meeting

While some view meetings as boring, pointless, and futile exercises, others see them as opportunities to exchange information and produce results. A combination of preparation and execution makes all the difference between a pointless meeting and a productive one.

1a. Purpose

A meeting, like a problem-solving group, needs a clear purpose statement. The specific goal for the specific meeting will clearly relate to the overall goal of the group or committee.

Determining your purpose is central to an effective meeting, as getting together just to get together is called a party, not a meeting. Do not schedule a meeting just because you met at the same time last month or because it is a standing committee. Members will resent the intrusion into their schedules and quickly perceive the lack of purpose.

Similarly, if the need for a meeting arises, do not rush into it without planning. A poorly-planned meeting announced at the last minute is sure to be less than effective. People may be unable to change their schedules, may fail to attend, or may impede the progress and discussion of the group because of their absence. Those who attend may feel hindered because they needed more time to prepare and present comprehensive results to the group or committee.

If a meeting is necessary, and a clear purpose can be articulated, then you'll need to decide how and where to meet. Distance is no longer an obstacle to participation, as we will see in a later lesson when we explore some of the technologies for virtual meetings.

However, there are many advantages to meeting in person. People communicate not just with words but also with their body language— facial expressions, hand gestures, head-nodding or head-shaking, and posture. These subtleties of communication can be key to determining how group members really feel about an issue or question.

Meeting in real time can be important, too, as all group members have the benefit of receiving new information at the same time. For the purposes of our present discussion, we will focus on meetings taking

place face-to-face in real time.

1b. Agenda

If you have a purpose statement for the meeting, then it also follows that you should be able to create an **agenda**, or a list of topics to be discussed. You may need to solicit information from members to formulate an agenda, and this pre-meeting contact can serve to encourage active participation.

The agenda will have a time, date, place, and method of interaction noted, as well as a list of participants. It will also have a statement of purpose, a list of points to be considered, and a brief summary of relevant information that relates to each point.

Somewhere on the agenda the start and end times need to be clearly indicated, and it is always a good idea to leave time at the end for questions and additional points that individual members may want to share.



If the meeting has an emotional point or theme, or the news is negative, plan for additional time for discussion, clarification, and recycling of conversations as the participants process the information.



Agenda

A list of topics to be discussed in a meeting.

1c. Group Size

If you are planning an intense work session, you need to consider the number of possible interactions among the participants and limit them. Smaller groups are generally more productive.

If you are gathering to present information or to motivate the staff, a large audience, where little interaction is expected, is appropriate. Each member has a role, and attention to how and why they are interacting will produce the best results.

Review the stages of group formation in view of the idea that a meeting is a short-term group.

➞ **EXAMPLE** You can anticipate a "forming" stage, and if roles are not clear, there may be a bit of "storming" before the group establishes norms and becomes productive. Adding additional participants who have no clear reason to be present will only make the process more complex and may produce negative results.

1d. Logistics

Inviting the participants via email has become increasingly common across business and industry. Software programs like Microsoft Outlook allow you to initiate a meeting request and receive an "accept" or "decline" response that makes the invitation process organized and straightforward.



Reliance on a software program may not always be enough to encourage and ensure participation. A reminder on the individual's computer may go off fifteen minutes prior to the meeting, but if they are away from their computer or if Outlook is not running, the reminder will go unseen and unheard. A reminder email on the day of the meeting, often early in the morning, can serve as a personal effort to highlight the activities of the day.

If you are the person responsible for the room reservation, confirm the reservation a week before the meeting and again the day before the meeting. Redundancy in the confirmation process can help eliminate double-booking a room, where two meetings are scheduled at the same time.

If technology is required at the meeting, such as a microphone, conference telephone, or laptop and projector, make sure you confirm the equipment reservation at the same time you confirm the meeting room reservation. Always personally inspect the room and test these systems prior to the meeting. There is nothing more embarrassing than introducing a high-profile speaker, such as the company president, and then finding that the PowerPoint projector is not working properly.



Technology: Apply Your Skill

You have applied for a new job and part of the interview process is a presentation. You have been asked to share your work portfolio with a panel via an online meeting app. You have never used this particular app, but you have heard it is easy and you don't anticipate any issues. What steps should you take to make sure things go well the day of the presentation? Do you need to prepare anything or can you just trust things will go well?

2. Conducting the Meeting

The world is a stage and a meeting is a performance, the same as an interview or speech presentation. Each member has a part to perform and they should each be aware of their roles and responsibilities prior to the meeting.

Everyone is a member of the group, ranging from new members to full members. If you can reduce or eliminate the storming stage, all the better. A clearly defined agenda can be a productive tool for this effort.

2a. Introductions

People may know each other by role or title, but may not be familiar with each other. Brief introductions can serve to establish identity, credibility, and help the group transition to performance.

The purpose of the meeting should be clearly stated, and if there are rules or guidelines that require a specific protocol, they should be introduced.

2b. Discussion

If you are cast in the role of meeting leader, you may need to facilitate the discussion and address conflict. The agenda serves as your guide and you may need to redirect the discussion to the topic, but always demonstrate respect for each and every member. You may also need to intervene if a point has reached a stalemate in terms of conflict.

Some meetings do not call for a table, but rather rows of seats all facing toward the speaker; you probably recognize this arrangement from many class lectures you have attended.

For relatively formal meetings in which information is being delivered to a large number of listeners and little interaction is desired, seating in rows is an efficient use of space.

2c. Transitions

Transitions are often the hardest part of any meeting. Facilitating the transition from one topic to the next may require you to create links between each point.

You can specifically note the next point on the agenda and verbally introduce the next speaker or person responsible for the content area. Once the meeting has accomplished its goals in the established timeframe, it is time to facilitate the transition to a conclusion.

You may conclude by summarizing what has been discussed or decided, and what actions the group members are to take as a result of the meeting. If there is a clear purpose for holding a subsequent meeting, discuss the time and date, and specifically note assignments for next time.

2d. Feedback

Feedback is an important part of any communication interaction, and one way to do this is through meeting **minutes**. Minutes are a written document that serves to record the interaction and can provide an opportunity for clarification.

Minutes often appear as the agenda with notes in relation to actions taken during the meeting or specific indications of who is responsible for what before the next meeting. In many organizations, minutes of the meeting are tentative, like a rough draft, until they are approved by the members of the group or committee.

Normally, minutes are sent within a week of the meeting if it is a monthly event, and more quickly if the need to meet more frequently has been determined.



HINT

If your organization does not call for minutes, you can still benefit by reviewing your notes after a meeting and comparing them with those of others to make sure you understood what was discussed and did not miss - or misinterpret - any key information.



TERM TO KNOW

Minutes

A written document distributed (typically via email) after a meeting to record the interaction and provide an opportunity for clarification.



SUMMARY

In this lesson, you learned about best practices for **preparing for a meeting**. Meetings are most likely to be productive and efficient when they have a clearly stated **purpose** and **agenda** that is communicated to the invitees. Thought should be given to **group size** when planning the purpose and agenda for the meeting. Finally, **logistics** such as pre-meeting contact, invitations, room preparation, and technological requirements must be attended to.

You also learned about best practices for **conducting a meeting**, such as beginning with **introductions**, keeping **discussions** respectfully focused on the meeting's purpose and agenda, and facilitating **transitions** to new agenda items to keep the meeting on time. Meeting minutes provide an opportunity for **feedback** and clarification after the meeting has concluded.

Best of luck in your learning!

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TERMS TO KNOW

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Minutes

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