



# Holding Effective Meetings

## Job Aid

### What is an effective meeting?

---

- 1** An effective meeting is a meeting that produces results. It should:
- Remain on topic
  - Allow for input from each attendee
  - Generate commitment from the participants
  - Involve each participant in actions
  - Produce a follow up plan

### How do I know if there is a need for a meeting?

---

- 2** By answering these questions, you should be able to decide whether or not there is a need for a meeting:
1. Is the transfer of information one-way?
  2. Is the sharing of information two-way?
  3. Is a meeting the best way to handle this?

If you need to disseminate information, sending an email or post to the company's intranet would be a better approach than scheduling a meeting. If you require feedback from all participants or if you are trying to come to a consensus on a topic, scheduling a meeting would be better than sending an email or an intranet post.

### What are the four phases of meeting management?

---

- 3** The four phases of meeting management are:
1. Planning the meeting
  2. Setting up the meeting
  3. Running the meeting
  4. Following up after the meeting

### What activities occur in the planning the meeting phase?

---

- 4** During the planning the meeting phase, you should:
- Define clear goals
  - Create a focused meeting
  - Assign meeting preparation and pre-work
  - Assign agenda items to certain individuals to lead the discussion or contribute specific information
  - Assign roles to specific people who will be at the meeting
  - Review the agenda to determine who really needs to attend

### Why is having a meeting agenda important?

---

- 5** An agenda should contain the meeting date, time, and location; general information; agenda items with background/goals; old/new business; and summary/assignments. A focused meeting agenda prepares the leader and attendees, creates an interest in the meeting, clearly defines the objectives, and provides a valuable organizational tool.

### What activities should happen during the setting up the meeting phase?

---

- 6** During the setting up the meeting phase, you should:
- Make sure you have all the audio/visual equipment and visual aids (PowerPoint presentations, whiteboard, poster with charts/graphs) you need
  - Determine the amount of space and number of chairs you'll need
  - Choose a room that can comfortably fit the number of people you invited
  - Set the room up at least 30 minutes early

### What are some tips for running an effective meeting?

---

- 7** In order to run an effective meeting, you should:
- Start the meeting on time
  - Welcome and thank attendees
  - Review the agenda
  - Have a time keeper, a note taker, and an idea keeper
  - Recognize attendees who wish to speak
  - Remain neutral (ask open ended questions, make sure no one is afraid to speak up, don't let any one attendee dominate, thank people for their input)
  - Maintain the schedule (keep attendees on topic, reel everyone back in, let the group know when time is up)
  - Summarize the discussion
  - Assign action items for each agenda item
  - Make a follow-up plan with assignments, individuals responsible for each assignment, and date for items to be completed

### What should I do to follow up after a meeting?

---

- 8** Following up with attendees after a meeting will help them to remember and complete their action items.

Follow up by:

- Sending meeting minutes within 24 hours of the meeting via email
- Continuing to check in with attendees to find out where they are in the process of completing their assigned action items
- Examine your meeting process and improve it for next time

### How can I learn more?

---

- 9** LPHI *On Your Time* trainings and resources
- <http://sites.bu.edu/masslocalinstitute/training/on-your-time-tranings/>
  - <http://sites.bu.edu/masslocalinstitute/resources>
- NEPHTC Trainings
- [nephtc.org](http://nephtc.org)