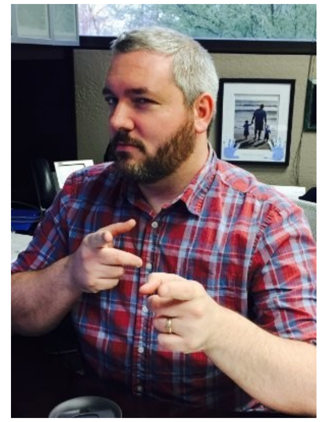
A WEEK IN Learning

How to Have an Effective Meeting

Dan Felzke, Sr. Director of Information Technology



I am in a lot of meetings. Project status meetings, vendor meetings, sales meetings, strategic initiative meetings, leadership meetings, department meetings, one-on-one meetings, and even quick drive-by meetings. These can last anywhere from fifteen minutes to a full day. Sometimes I am just a participant, and other times I coordinate and facilitate them from beginning to end. What I have found is that the most effective meetings have a formula, or at least a set of principles, which I have outlined in this article. By following just some of these meeting principles – you can make any meeting more effective.

"Ensure everyone is on the same page and understands what the goals of the meeting are."

- Dan Felzke

PLANNING FOR THE MEETING

Is the meeting necessary? If the meeting is purely informational and no decisions need to be made, then send an email to make your intentions clear about what your expectations are.

Develop an agenda. Meeting attendees should know what the meeting is about so they can amply prepare for it. It's also a good idea to estimate how long each agenda item will take to ensure that there is enough time in the meeting, as well as how long presenters should target their piece for.

Invite the right people. Meeting sizes should be kept to a small working group. Six to eight members is a great number to strive for when creating an attendee list.

Meeting length. Be cognizant of people's time, but ensure there is enough time in the meeting to discuss everything in the agenda.

Pre-reading material. If there is lengthy information to discuss in the meeting, it would be a better usage of everyone's time to send out pre-reading information.

BEGINNING THE MEETING

Show up early. If you are going to be projecting a presentation, or have meeting handouts, show up early and be prepared. Projectors can be finicky sometimes and meeting room configurations are all different.

Determine the facilitator. Be prepared to be the facilitator if you are the one who planned the meeting. You are responsible for ensuring that the meeting agenda is followed, and that tangents are avoided.

Determine the note taker. This person is responsible for notating decisions and action items. This should also be someone different from the facilitator (which is why I usually volunteer for the facilitator role). The note taker is also responsible for sending out the notes of the meeting in a timely manner afterwards.

Discuss attendance. If an attendee notified you that they are unable to attend, let the other meeting attendees know.

How to Have an Effective Meeting

Silent start. Did everyone read the pre-reading assignment? If the majority have not, use the same tactic Jeff Bezos from Amazon uses and have a silent start to the meeting.

State the goals. Ensure everyone is on the same page and understands what the goals of the meeting are. Ask attendees for their goals as well. This establishes appropriate scope and allows for alignment.

DURING THE MEETING

Stay on track. In the beginning of the meeting, the goals were established. The facilitator needs to ensure that the conversation doesn't stray too far from accomplishing the goals set forth earlier.

Task commitments. If a task needs to be completed, when will it be completed? If a time/date can not be determined during the meeting, push for a commitment.

Point out action items. When someone has committed to a task, point that out during the meeting and ensure the note taker jots it down. Clarify and agree on what the commitment and due date is.

END OF MEETING

Review the action item list. Before the meeting concludes, the note taker should review the action list and due dates with all of the attendees. Everyone in the meeting should understand what they are accountable for.

Determine next steps. Is another meeting necessary? How will action item status be reported to the group? Can all of the action items be taken care of via email?

AFTER THE MEETING

Ensure meeting notes are sent out in a timely manner. Meeting notes should be sent out within a couple business hours of when a meeting concludes.

Status updates. Group members should update the group on the status of their action items. Being in IT, I like to use certain tools such as Slack, Trello, and Flow to keep abreast of status updates.

Reflect. Did you feel that the meeting was effective? Ask some of the other attendees directly if you aren't quite sure. Create a survey if you feel that you would receive a better response anonymously.

I hope that you find some of these principles easy to apply to your own meetings, and in turn, make them more effective! By following these principles, you will realize that the number of status meetings will begin to dwindle because everyone is on the same page. Additionally, people will be more accountable and more action items will be checked off. Finally, you will have more focus and time to make important decisions and do the work that is being assigned. Here's to you and your new effective meeting approach!

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