

# Effective Meetings

Presented by  
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# **\*Course Overview**

## **Learning Objectives**

- 1. Review Microsoft Teams platform Understand the value of meetings as a management tool**
- 2. Recognize the critical planning step that makes meeting time more effective**
- 3. Develop and practice techniques for handling counterproductive behaviors**

**What are your learning objective goals for today?**



# Your Learning Objective



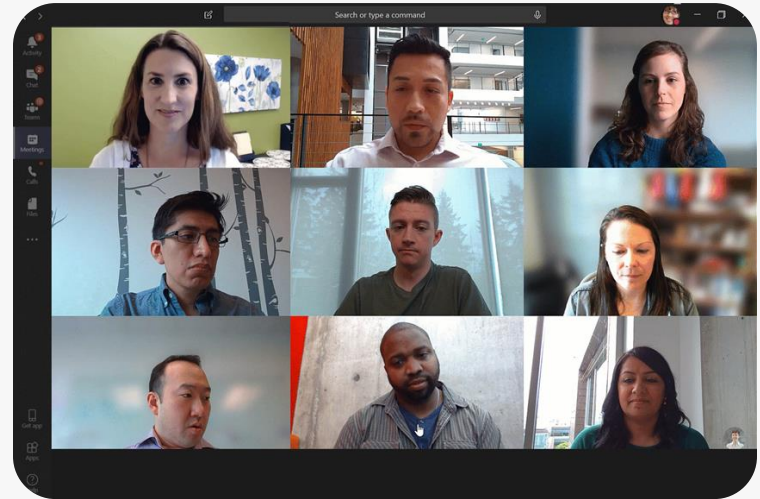
**Briefly share your own  
learning objective**



# Hosting Meetings in MS Teams

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Chat, Meet, Call, and Collaborate (Share )  
anytime, wherever you are



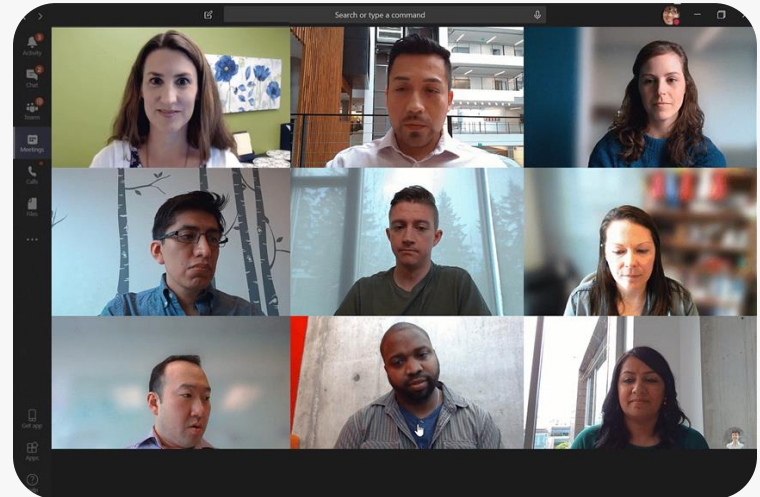


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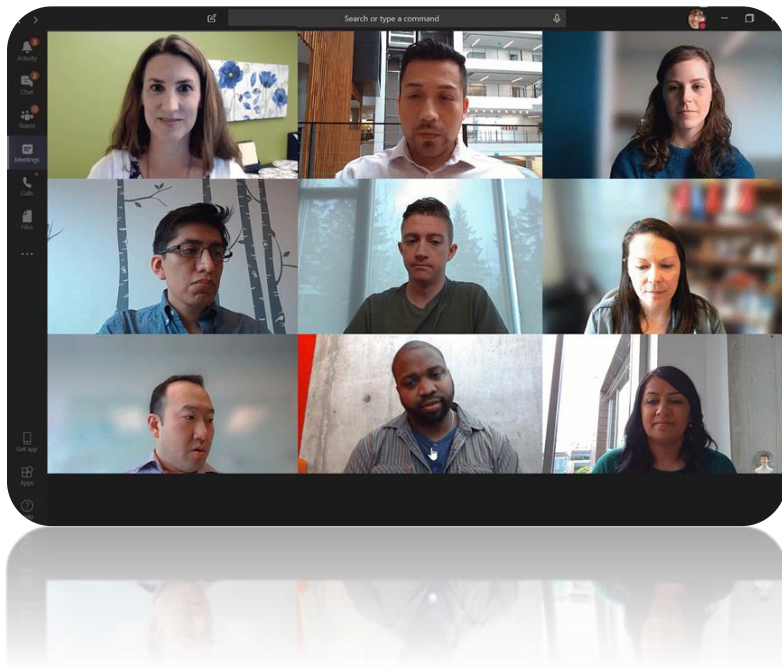
# Meet

## Manage and control your meetings

Host secure online meetings with the ability to mute, remove uninvited attendees, and designate presenters and participants. Allow people to join automatically or have them wait in the virtual lobby.



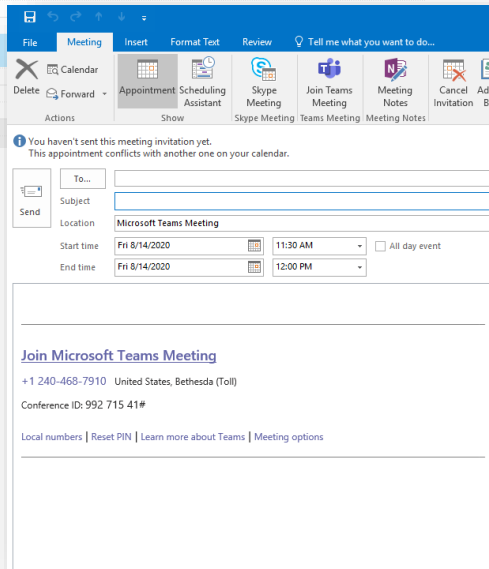
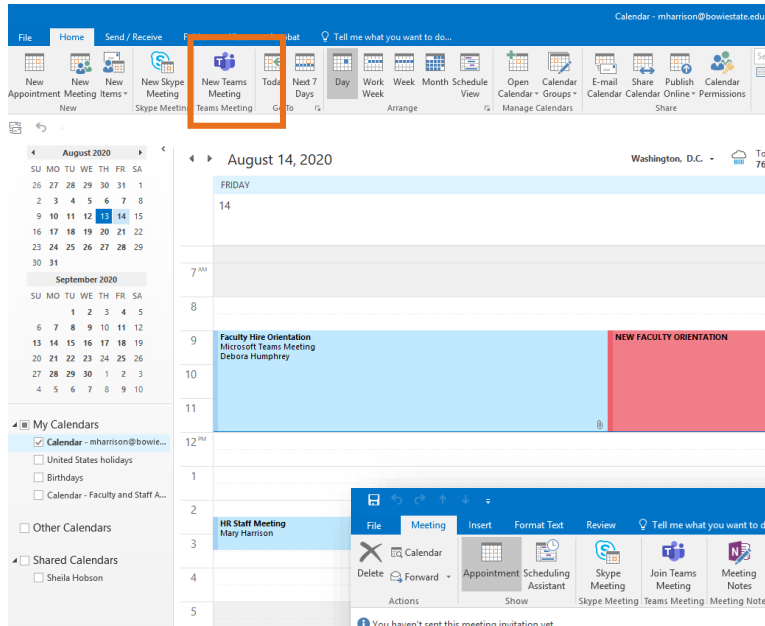
# Meet



## Types of Meetings

- » Online meetings
- » Presentations
- » Live Events with up to 10,000 participants  
*With Teams live events, users in your organization can broadcast video and meeting content to large online audiences. **Live events***
- » Hold any meeting live—**large meetings**, webinars, company-wide events, and presentations with up to 10,000 attendees inside or outside your organization—with Teams **live events**.
- » **Audio conferencing**
- » Let people join meetings on the go with a global dial-in number or contact each other directly. All they need is a mobile device and Teams.

# Scheduling a Meeting



## From Outlook Calendar

Logon to your computer using your BSU email and password

- » Logon to computer using your BSU email and password
- » Open Outlook and go to the calendar
- » Click on the New Teams Meeting icon
- » Complete the necessary fields (Note that dial-in options are automatically assigned including phone number and Conf. ID#)

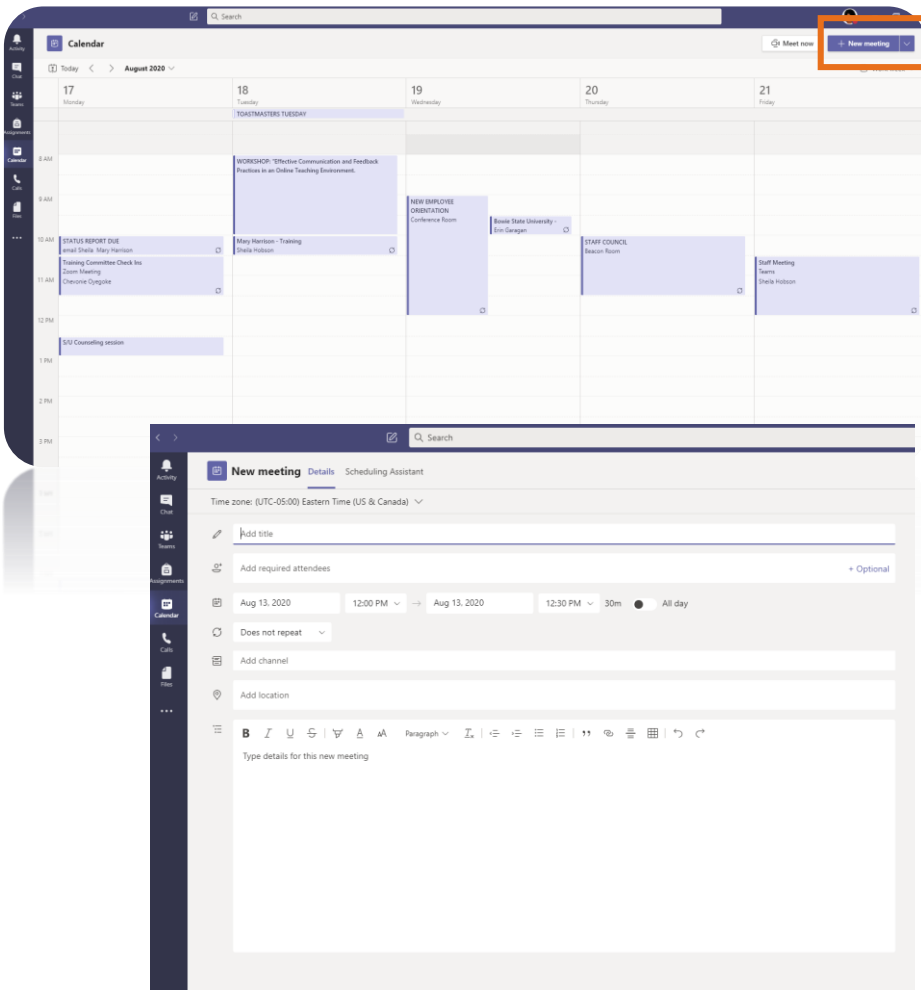
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# Scheduling a Meeting

## From Teams Calendar

### Logon to MS Teams

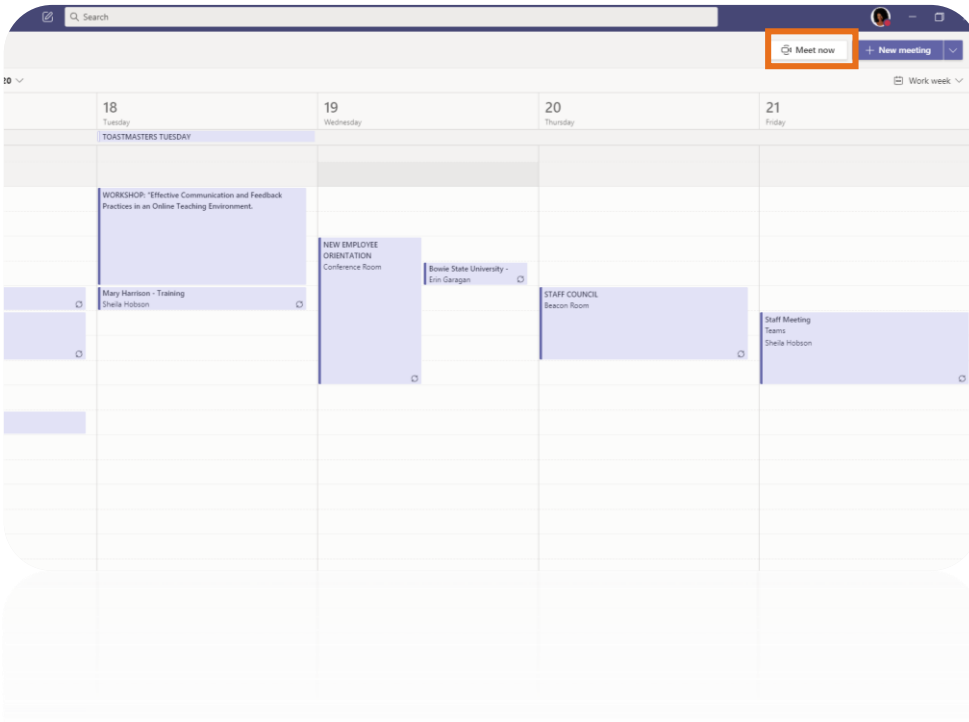
- » Click the calendar option from the left side menu
- » Select New Meeting
- » Complete the necessary fields in the new meeting dialog box
- » Meeting invite is automatically emailed to people invited.



# Host an Instant Meeting

## Logon to MS Teams

- » Click the calendar option from the left side menu
- » Select Meet Now
- » Your meeting will start

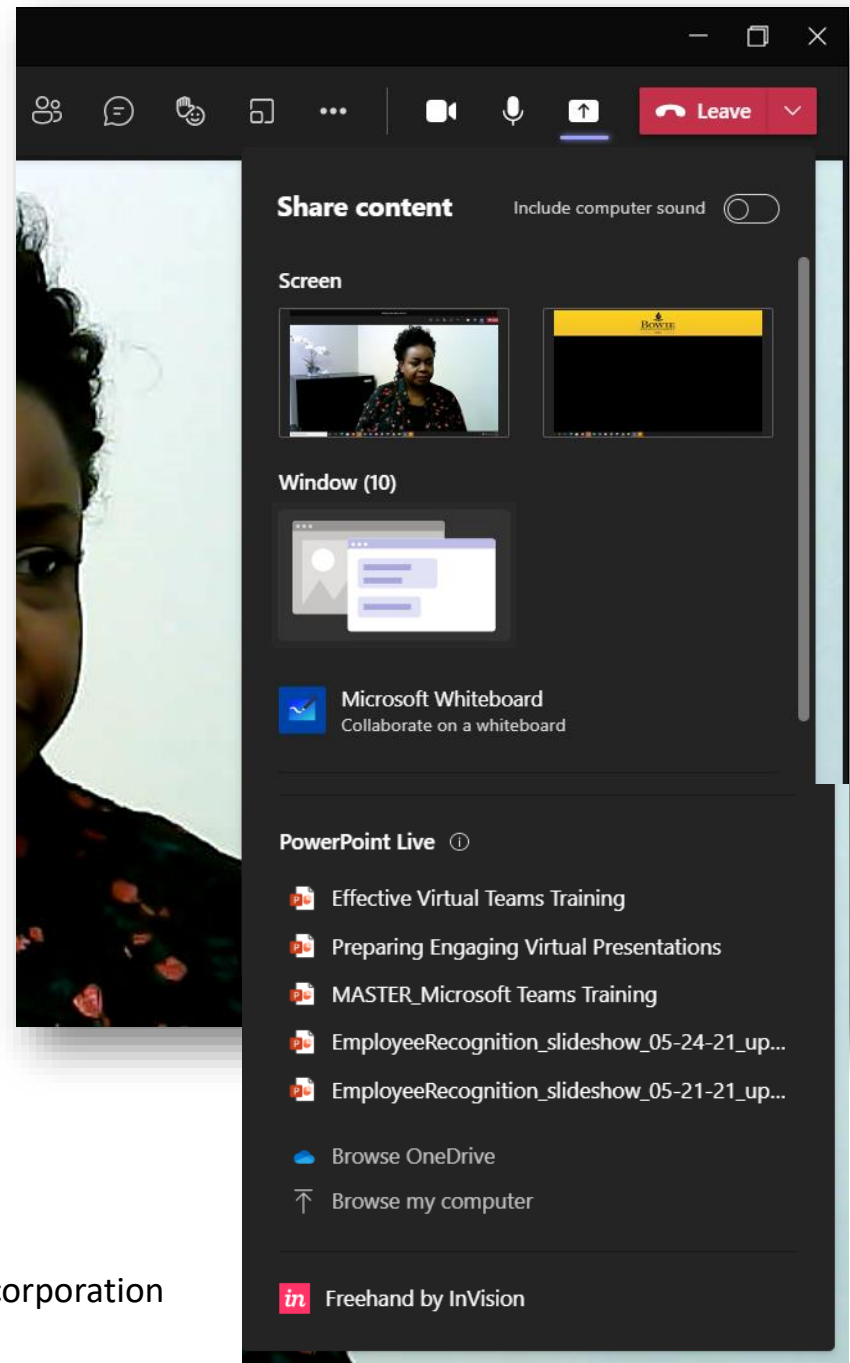


# Share Screen

You may share your screen, a window or documents

1. To share you may do the following:

1. Select **share content icon** (*the share options open*)
2. Choose what you would like to share
3. A red outline will box the item you have selected
4. You may share:
  - i. Screen
  - ii. Window
  - iii. Open documents on your computer
  - iv. Browse your hard drive to find a document to share



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# The Basics for Effective Meetings (II)

## Meeting Participants

- A working meeting should typically be made up of about **3 - 10 people**.
- This enables the group to work together, solve issues in a productive manner, come to conclusions, and get work done.

# The Basics for Effective Meetings

Not all meetings have the same purpose

## Types of Meetings

- Information meetings
- Problem-solving meetings
- Brainstorming meetings

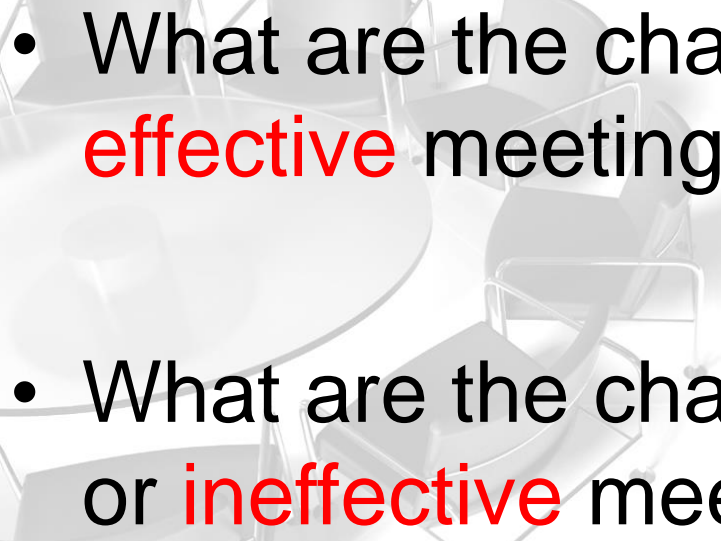


# The Basics for Effective Meetings (IV)

## Other Options

- Meetings are **not** the only option for **sharing, brainstorming, and discussing solutions to problems.** *(name other ways)*
- Be sure to consider whether the issues could be tackled **without bringing everyone together.**
- Are there **negative consequences** to not holding a traditional meeting?

# The Best and Worst of Meetings

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- What are the characteristics of **well-run** or **effective** meetings?
  - What are the characteristics of **poorly run** or **ineffective** meetings?

# The Best and Worst of Meetings

## Effective Meetings

- Agenda is prepared
- Have a chance to see the agenda ahead of time
- Can add to the agenda
- People come to meetings prepared
- Meetings start and finish on time
- Everyone gets to talk
- Decisions are made by the group
- Actions get accomplished
- Someone takes notes or minutes

**Debrief**



# The Best and Worst of Meetings

## Debrief



## In effective Meetings

- Nobody is prepared
- Meetings start late and end late
- Certain people dominate the conversations
- Certain people dominate decisions
- Nothing gets accomplished
- No record of meetings so discussions occur over and over
- No agenda

# Holding Productive Meetings

## Keys to Productivity (I)

### **Productive meetings occur when:**

- You want information or advice from your group.
- You want to involve your group in solving a problem or making a decision.
- There is an issue that needs to be clarified.

# Holding Productive Meetings

## Keys to Productivity (II)

### **Productive meetings occur when:**

- You have concerns that you want to share with your group.
- There is a problem that involves people from different groups.
- There is a problem to resolve or a decision to be made and it's not clear what the problem is or who is responsible.

# Holding Productive Meetings

## Keys to Productivity (III)

### Things that can hamper productivity:

- There is **inadequate data** or **poor preparation**.
- Something could be communicated better by telephone, memo, or in a one-to-one discussion.
- The subject is *trivial*.
- The decision maker has their **mind made up**.

# Holding Productive Meetings

## Keys to Productivity (IV)

### Things that can hamper productivity :

- The subject matter is so confidential or secret that it can't be shared with some group members.
- Personnel issues like hiring, firing, and negotiating salaries need to be dealt with.
- There is too much anger and hostility in the group and people need time to cool down.

# Preparing for Meetings (I)

## Checklist for Success

- ☐ Why are we having a meeting?
- ☐ What are my objectives?
- ☐ What is the desired outcome of the meeting?
- ☐ What type of meeting do I want to have?
- ☐ Who should attend?
- ☐ What kind of involvement and participation do I want?



# Preparing for Meetings (II)

## Checklist for Success ctd.

- ☐ **Where** are we going to meet?
- ☐ What should the room/platform arrangements be?
- ☐ What **roles and responsibilities** should individuals have?
- ☐ Who will have the **authority to make decisions**?
- ☐ What **methods** will we use?



# Preparing for Meetings (III)

## Checklist for Success ctd.

- ☐ How much **time** should I allow?
- ☐ Do I need a published **agenda**?
- ☐ Will there be **presentations**?
- ☐ Will there be some kind of **record**?
- ☐ **How** are we going to *determine tasks, deadlines, and responsibilities*?



# Preparing for Meetings (IV)



## Timing Your Meeting

- The best time is one that fits with the **work routines** of meeting participants.
- One hour after work begins, shortly after lunch, and before the final hour in the day are all **popular meeting times** for office staff and managers.
- For **production staff**, prior to or following shifts may be a good time.

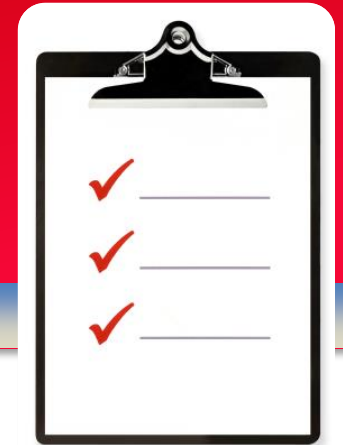
# Preparing for Meetings (V)



## Timing Your Meeting ctd.

- **Breakfast meetings or lunchtime** should also be considered.
- The **best way** to set a meeting is to schedule the next session at the end of the one in progress.
- The **worst way** is to call each member of the group individually.
- In the **middle** is the use of a "When can we meet?" e-mail.

# Preparing for Meetings (VI)



## Deciding Who Should Attend

- i. Those who can benefit enough for the meeting to be worth their time
- ii. Those who can contribute enough to justify their attendance at the meeting
- iii. Who wants to be at the meeting

# Agendas



## Setting an Agenda (I)

One of the two most **powerful tools** in meeting management is the meeting agenda.

- If you're a **leader** – **provide it!**
- If you're a **participant** – **ask for it!**

# Agendas



## Setting an Agenda (II)

- An **agenda** is a necessary document that presents the order that issues will be discussed.
- The **objectives** are things that will be accomplished.
- **Agendas** can be formal or informal, complex or simple, short or long, specific or general.

# Agendas



## Setting an Agenda (III)

- If there is a meeting, there ought to be an **agenda**.
- You should get an **agenda before** each meeting and set of **minutes afterwards**.
- Minutes are a **legal record** of a meeting
- It's up to the leader to establish the **objectives** and prepare the **agenda**.

# Agendas

## Correct Order

- Name of group/activity
- Date
- Time
- Place
- List of attendees
- Attendance
- Minutes from previous meeting
- Committee reports
- Unfinished business
- New business
- Date of next meeting
- Time of next meeting
- Adjournment



# Setting the Place (I)

## Factors to Consider

- Virtual? What Platform?
- In-person - availability of the room
- Large enough to comfortably accommodate the participants and equipment (social distance?)
- Appropriate furniture including tables and chairs
- Adequate lighting and ventilation
- Free from interruptions and distractions
- Convenience for participants
- Cost



# Setting the Place (II)



## Virtual/Physical Setup

- Virtual – Perfect the tech
- In-person - make sure that **water** is available for participants (*if possible*).
- A **flip chart, whiteboard, smart board, or projector** should be available.
- Be sure that **visual aids** can be seen by all, and are ready and in good working order.
- Have **power connections** if requested.
- If meetings last more than an hour and a half, a break with **refreshments** should be scheduled.

# Setting the Place (III)



## Advanced Notice

- Time (*starting and ending*)
- Place/Platform
- Objectives of the meeting
- Preparation to be done by participants
- Names of other participants



# Leading a Meeting



## Functions of a Leader (I)

### The Leader and the Organization

- Meeting participants tend to read the meeting leader's behavior closely and to **act accordingly**.
- **Your approach** to the meeting will affect people's approach to future meetings.
- Think about **what you are demonstrating**.

# Leading a Meeting

## Functions of a Leader (II)

- **The task function:** To get the problem solved or the issue discussed.
- **The group relations function:** To keep a group of diverse individuals working as a team.



# Leading a Meeting

## Functions of a Leader (III)

### Key Tasks

- Initiate the meeting
- Solicit opinions from the group
- Give information
- Clarify
- Summarize
- Problem solve
- Try to arrive at a consensus
- Make decisions
- Create and implement action plans



# Leading a Meeting

## Debrief (I)



## Initiate the Meeting

- Have the agenda posted
- Review the agenda at the beginning of the meeting
- List objectives and get buy-in

# Leading a Meeting

## Debrief (II)

### Solicit Opinions from the Group

- Ask questions (What if...)
- Paraphrase
- Summarize



# Leading a Meeting

## Debrief (III)

### Give Information

- Stick with the facts
- Be prepared
- Keep it brief
- Don't be afraid to say you don't know
- Don't present solutions



# Leading a Meeting

## Debrief (IV)

### Clarify

- Record ideas verbatim on the flip chart or virtual (whiteboard/notes area)
- Paraphrase
- Summarize



# Leading a Meeting

## Debrief (V)

## Summarize

- Pull related ideas together
- Restate suggestions after the group has discussed them
- Offer a decision or conclusion for the group to accept or reject



# Leading a Meeting

## Debrief (VI)

### Problem Solve

- Use a process and apply a problem-solving method
- Work out what the real problem is, make some decisions, and assign action steps
- Report and discuss progress



# Leading a Meeting



## Debrief (VII)

### Try to Arrive at a Consensus

- Get people to comment and build on each other's thoughts
- Note similarities rather than differences

# Leading a Meeting

## Debrief (VIII)

### Make Decisions and Create and Implement Action Plans

- Action must be taken to move ahead
- Who will be responsible for implementing changes, informing others, and involving the right people so that implementation can take place?



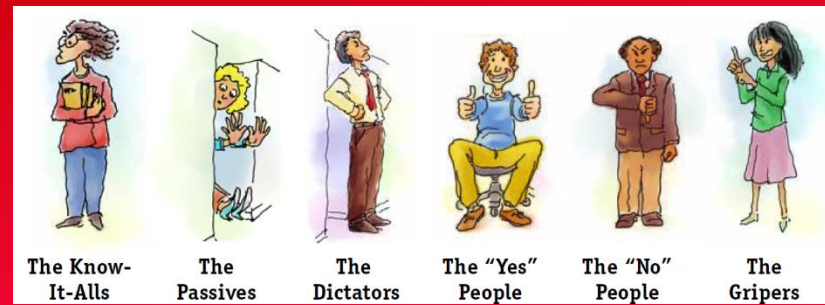
# Leading a Meeting

## Your Role as Group Leader

- Encouraging
- Expressing group feelings
- Valuing ideas
- Harmonizing
- Gate-keeping
- Modifying
- Evaluating



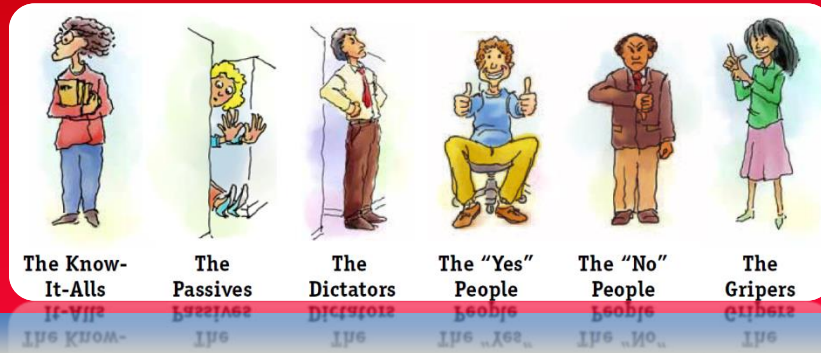
# How to Control a Meeting



## Dealing with Difficult People (I)

- Some **topics and situations** can provoke strong feelings and reactions in people.
- It's the **leader's responsibility** to **maintain control of the meeting** and to provide a **safe structure**.
- **Maintaining control** means that the **chair** keeps the **meeting on schedule** and **manages the flow of conversation**.

# How to Control a Meeting



## Dealing with Difficult People (II)

- This includes **following the agenda**.
- **Good planning** by the meeting chair is essential.
- Your **communication skills** are essential.

# A Plan for Success



- Identify the **ineffective** parts of your last meeting.
- Develop an **action plan** to **improve** those ineffective elements.

# Wrap Up





## **Learning Objectives Review**

- 1. Understand the value of meetings as a management tool**
- 2. Recognize the critical planning step that makes meeting time more effective**
- 3. Develop and practice techniques for handling counterproductive behaviors**

**What are your learning objective goals for today?**