

Meeting Considerations



In-Person Meetings

Before the Meeting

1. Could we *not* have a meeting:

- Will a consultation do, ask others for their view
- Could papers be sent out for comment instead
- Does it need to be in person (see virtual meetings below)

2. Consider the time and place:

- Where are people travelling from
- Can the meeting be tied in, with other visits, from remote workers or those from other offices
- Morning meetings are often preferred, consider commuting times
- Does the meeting space, show those attending that they are valued, and that the meeting content is important

3. People and purpose :

- What is the specific outcome we want from the meeting or the Agenda items
- Who do we need to invite, to contribute, provide information, or make decisions
- Have we created a psychologically safe workplace for people to feel confident to share
- Agree meeting 'roles' eg, Note taker, Chair, Action-Chaser, consider that the note-taker may feel excluded since they can't listen and think as effectively when writing, pause, or could someone else take on that role
- Inform invitees to notify the organiser, by a set date, whether they are attending or not
- Diarise (as the organiser) when to check that all participants have responded
- Provide training including listening skills, techniques to create thinking time, thereby ensuring people can focus on what is being said, rather than thinking ahead to their response, these skills create fresh ideas
- Diarise ahead, if appropriate, a time to follow up actions or next steps, after the meeting
- Consider rotating the Chair's role through participants, depending on decisions required

4. Agenda :

- Ask for Agenda items to be sent by a set date and send the final Agenda, rather than a draft one for review
- Delete 'any other business', Agenda items only, any Burning Topics can go to the next/another meeting
- Set Agenda items as a question, this makes it very clear what needs to be thought through, the objectives, decisions needed, or outcomes desired, from each item
- Circulate any information needed in advance and with a question, so that people can review it with that focus in mind
- Set realistic time scales
- Include a start and end time on the Agenda (some find it helps promptness to start at odd times ie 9:14)

During and After the Meeting

During a Meeting

- Arrive on time, start on time, keep to time
- Start a meeting with introductions, especially if participants change, or the individuals don't interact often
- Go around the 'circle' asking everyone to share one thing that is going well for them (it may feel uncomfortable to start but it improves the mood, creates a fresh start from the rest of the day, and the hormones released improve clarity of thinking, and openness to ideas)
- Maintain a focus on the Agenda
- If someone genuinely needs to be at one part of the meeting, let them go, otherwise avoid part attendance
- Give every single person the chance to speak on each, and every, Agenda item, go around the table i.e. everyone has approximately two minutes (perhaps only strictly monitored if some people become verbose)
- Be clear that everyone can use their 'time' to think quietly to themselves or out loud, this both supports 'introverts', and encourages deeper reflection before talking (due to fear of interruption, lack of thinking time, the same voices being heard, and as such ideas being the first thing that comes to mind, and then repeated, or tweaked, rather than fresh thinking and new ideas), if someone skips, it doesn't come back to them
- Consider use of language and keep jargon to a minimum
- Maintain challenging with courtesy
- Set appropriate times for comfort/check email breaks to avoid people leaving the room at different times
- No use of devices (save if being used to read meeting content or diary planning)
- Chair to summarise each point, or actions (having had individuals share their belief of their own actions first), before moving on to the next Agenda item
- Continue another day, rather than overrun, unless with permission (ask for it rarely)
- Finish with going around the table, asking each person to appreciate a quality about the person sat next to them (it improves team relations, trust, and creates a culture of appreciation and noticing the positive)

After a Meeting

- Issue main points and actions within two days
- Diarise, set aside time for actions, and complete them
- Prepare for the next meeting where appropriate
- Follow up on action deadlines outstanding, in good time before the next meeting
- If you have agreed to an ongoing task, produce a summary of actions as you go, to show those completed, outstanding, or new queries, as appropriate
- If the same topics are coming up each time on the Agenda – as the Chair, can you ask a better Agenda question to move it forward

Virtual Meetings

Benefits of Virtual Meetings

- Allows for a geographically wider workplace, individuals, and teams
- Allows for a more diverse workplace and team
- Reduces travel time that lacks value
- Allows working across different time zones
- Being able to work during COVID-19!

Challenges of Virtual Meetings

- Can limit flow and natural conversation
- Social interactions are reduced which may limit how openly people will share
- Can feel more formal (or informal) than intended
- Depth of content exploration can be impacted virtually
- May feel uncomfortable, with what feels like the single focus, when speaking online
- You cannot see everyone as easily (sometimes)

Virtual Meetings - Additional Considerations

- How formal/informal will the meeting be
- What platforms do you want to use, what equipment, and what training is necessary
- What are the rules of etiquette, chit chat (it may be useful to encourage it, plan for it, and lead by example), dress codes, muting, video on/off
- A set frequency, and at regular times/days, is often more important for structure, with remote working
- Consider screen fatigue and meeting fatigue, can they be shorter, fewer, are there better alternatives
- Interruptions become even more obvious during virtual meetings, if using the technique above of going around the table, have everyone draw/print out a virtual table, and where everyone is sat, for ease

Managing Virtual Teams – Additional Considerations

- Create separate communication channels, eg for banter, projects, teams, general work, and work emergencies (ie WhatsApp/Slack/Teams)
- Consider different ways of working and reporting, asking them to send their plans and proposed timetable, clarifying what updates, you want, when, and how, do you want to ask for certain emails, or communications, to be acknowledged as received, ask them how they are best managed (avoid micro-managing)
- What interactions do individuals need to feel supported, and included, what is their preferred method of communication and yours
- Consider social interactions for greater inclusion and relationship building, the loss of conversation in the office or at the water cooler has an impact, this could range from a daily 10-minute cup of tea, to set team activities, include some that 'ban talking shop' (these can also help spot areas of stress or atypical behaviour)
- Consider online ways of displaying progress, celebrating successes, holding 1-2-1's
- Find ways to encourage questions, either of you, or from others, rather than struggling alone, since it may feel more serious, or formal, to ask virtually, as opposed to a quick question from across the desk
- Set and support boundaries around non-working hours and encourage breaks
- Share your own stories, as appropriate, to allow people to open-up socially, or regarding wellbeing
- Emojis are often considered inappropriate in business, however, they can readily express the intention and meaning of a message, and avoid misunderstanding
- How can you build and show trust for those working from home, including flexibility in the day and response times
- Consider regular reviews and discussion about how the virtual structure is working

***Want to know more about how to truly Transform Your Meetings? Please get in touch
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