

Contents 1. Plan and prepare for meetings 2. Conduct meetings 3. Debrief and follow up meetings. Unit objectives By the end of this topic, the student should be able to: 1. Discuss how to plan and prepare for meetings 2. Demonstrate how Conduct meetings 3. Explain how to debrief and follow up meetings

Meeting Definition Meeting is a gathering of people for discussion. It is an occasion when people gather together to discuss something. Or A meeting is an assembly of persons, especially for entertainment, workshop etc. When there are two or more persons, there is a meeting, structured or otherwise.

Importance They facilitate exchange of information. Fostering of team spirit and commitment to common goals and objectives. Types of Meeting: It is important to think in terms of different kinds of meetings with different kinds of participants and different purposes. a) Business meetings– With customers, clients, colleagues, etc.; often require presentations. b) Staff meetings– to clear calendars, coordinate unit activities, share information, etc. c) Management Team meetings– to solve problems, make decisions, set policy, etc. d) Interdepartmental meetings– to get input, interpret decisions and policies, share info, etc. e) Board meetings – to report results, set policies and directions, scan for needed changes, etc. Purpose of Meeting: Important purposes for holding meetings in business organizations: 1. To save time in Communication. 2. To instruct a group for a specific purpose, that is , briefing. 3. To discuss and solve problems relating to business 4. To resolve conflicts, confusion and disagreement among interest groups. 5. To give and get new ideas and immediate reactions. 7. To arrive at consensus on issues. 8. To learn from others and to train others. Ten golden rules for convening a meeting 1. 2. 3. 4. 5. 6. 7. The meeting should be convened only when it is essential. Meetings should have time schedule and must begin and end on time. Meetings should be convened only when no telephonic discussion is possible. They must have clear and specific agenda and sub agenda. They must have clear objectives. Time limit should be specified for each item of the agenda and sub agenda. The notice of the meeting should be sent well in time before the meeting, to those who are required to attend the meeting. 8. Conclusion of a meeting is summarized 9. Action oriented minutes should be prepared and circulated after the meeting. 10. Meeting should be closed on a pleasant tone. Plan and prepare of meeting: Performance Criteria for this Element are: ● Identify the need for meetings and who should attend ● Decide on the style of the meeting and level of formality required according to meeting purpose, occasion, nature of participants and enterprise procedures ● Make arrangements for the meeting in accordance with organisational requirements and within designated timelines. Identify customer/guest requirements Performance Criteria for this Element are: Develop an agenda in accordance with the purpose of the meeting Prepare meeting papers and dispatch to participants before the meeting, where appropriate, and within appropriate timeframes. Characteristics of meetings: In essence meetings are planned events, with some form of structure and purpose are designed to: ☐ Get people together ☐ Get alignment towards a specific range of topics ☐ Provide information ☐ Brainstorm ideas ☐ Exchange ideas and thoughts ☐ Understand the topics discussed ☐ Reach confirmation and agreement ☐ Assign accountability and actions ☐ Decide on further action or strategy. Identify the need of meeting: Every meeting must have a purpose There must be a reason to get people together The purpose of a meeting must be clear for all participants. What are common needs of a meeting? Meetings aim to: ● Inform people and share information about new issues or developments ● Access new information and

exchange information between participants at the meeting • Make decisions by using those present to brainstorm ideas and offer solutions • Review and monitor existing programs or project manage new ones. Intention of meeting: The intention of meetings will normally be dictated by the outcome to be reached including: • Problem–Solving Meetings • Decision–Making Meetings • Planning Meetings • Feedback or Follows–Up Meetings • Combination Meetings. Key roles in meeting: In order to achieve those outcomes in an orderly and fair manner, certain positions or roles are assigned to certain participants. Key roles in meeting are generally: Chairperson Secretary Treasurer. Chairperson • It is the chairperson's responsibility to ensure the meeting's purpose is achieved • There are two ways the Chairperson can attain their position, they can either be elected or they can be appointed • The position is also chosen based on experience, responsibility or seniority. Some of their key responsibilities include: • They liaise with the secretary regarding the next agenda and contribute to its final copy • They ensure that the minimum number of people are present so that the meeting can take place • They open the meeting by welcoming participants • They make sure someone is taking the minutes. Chairperson..... Attempt to move the meeting along at a timely and orderly pace by: Ensuring speakers direct questions to them One person speaks at a time Speakers only speak once on a motion Speakers remain focused on the topic of discussion Make certain that motions are properly moved and seconded and that is recorded by the minute taker Remain objective when someone is stepping out of the guidelines or not addressing the issue in question Set the date, place and time for the next meeting. Secretary The secretary's position is integral to the efficient functioning of a meeting. Their duties are numerous and their tasks can be broken down into: Before the meeting During the meeting After the meeting. Before the meeting taking place, they will be responsible for: Drawing up the agenda and sending out notices of meetings Preparing items and organising correspondence Ensuring there is enough seating. Secretary.... During the meeting , they will be responsible for: Taking a record of who is present, absent and reading out apologies for those absent Read out the minutes from the previous meetings and any correspondence as a result of previous minutes Take notes and minutes Action incoming and outgoing correspondence. After the meeting , they will be responsible for: Writing up the minutes from the previous meeting notes Following up on any correspondence Completing any tasks given from the meeting Preparing for the next meeting. Treasurer A treasurer is in charge of ensuring the finances of the organisation are kept in order. They must: • Ensure bills are paid • Confirm income is deposited into the bank • Report to the meeting on issues of finance • Provide participants with an financial position. Participant in Meetings: When deciding on the people who are to be invited to a meeting there are a number of questions that must be answered. • Is this person required to play an active role in the meeting – speak, share information or make a presentation? • Are the meeting topics relevant to the person? • Does the person need to be actually at the meeting to receive the information or can it be delivered to them in another format? Styles of Meeting: he style of a meeting normally refers to the location or layout of a meeting. It is aimed around the level of interaction and passing of information within the meeting. Meeting styles will normally include: Round table Lecture Seminar Conference. Congress Workshop Training course Promotional event Telephone conference call Video conference. Exhibition or trade show Frequency of Meeting: Since a meeting can be held once or often, the meeting

organizer has to determine the repetition and frequency of occurrence of the meeting. Frequency of meetings, normally comprise of: ● A one-time meeting ● A recurring meeting ● A series meeting.

Formality of Meetings: Formality of meetings will normally dictate: ☐ Attire to be worn at the meeting ☐ The structure of the meeting ☐ Style of presentations and information to be given ☐ Conduct ☐ Budget and planning ☐ Catering.

Organizational Requirements of Meeting: Each business will have their own policies and procedures in relation to: ☐ When meetings are scheduled ☐ Who is required to attend ☐ The style and format ☐ The required action of participants ☐ Confidentiality of information.

Arrange of Meetings: Once the type, style and formality of meeting has been identified, the arrangements must be made to ensure the meeting is conducted in a professional and effective manner. The aim of arranging meetings is to enable all participants within the meeting to be able to undertake their role in a manner that is streamlined, with all necessary tools at their immediate disposal.

What do you need to arrange for a meeting? Activities to be performed when arranging meetings

- Identify meeting leader or organizer
- Identify date, time and location
- Book meeting facility
- Identify budget.

Arrange of Meetings.....

- Prepare information & agenda
- o Agenda and meeting information
- o Accommodation options
- o Transportation arrangements or options
- o Background information on city or country
- o Weather information
- o Direction to the venue
- ☐ Event schedule
- ☐ Names of participants
- ☐ Background information on the company or topics for discussion
- ☐ Dietary requirements.

Arrange of Meetings.....

- Notify people
- Organisers
- Catering staff
- Participants
- Suppliers
- Meeting room co-coordinator
- Media.

Arrange venue layout

- Tables and Chairs
- Surrounding furniture
- Stage
- Signage
- Aesthetics.

Arrangement of Meetings:

- Arrange Equipment
- ☐Computers
- ☐Printers
- ☐Scanners
- ☐Photocopiers
- ☐Telephones
- ☐Teleconference equipment
- ☐Video conference equipment.
- ☐ Data Projector and screen
- ☐ Audi Speakers
- ☐ Internet connection or 'wifi'
- ☐ Microphone (cordless or fixed)
- ☐ Microphone stand and speakers
- ☐ Whiteboards and electronic whiteboards.

Arrange stationery 'Stationery kit' which comprises a ruler, pencils, pens, scissors, highlighters, glue, pins, 'blue tak' calculator, laser pointer, whiteboard markers, eraser, stapler, staple remover and hole punch

- Pens and pads
- Name badges
- Place settings
- Water glass
- Mints.

Arrange catering

- Catering staff
- Glassware, crockery and cutlery
- Service area
- Service equipment
- Clothes and trays
- Food
- Timing of meals
- Special requests of dietary requirements
- Menus
- Cash lists, registers and cash float if items are to be sold.

Arrange Meetings.....

- Specialised meeting staff
- Welcoming staff
- Meeting organisers
- MC –Master of ceremonies
- Language translator
- Photographer
- Audio and visual expert
- Computer technician
- Catering staff.

Preparing of Agendas:

- ☐Contact the Chairperson of the meeting
- ☐Identify topics for discussion at the next meeting
- ☐Note the topics on the agenda
- ☐Confirm all agenda topics and sequence order
- ☐Confirm participants to be invited
- ☐Obtain participant contact details, addresses and or email numbers so that the agenda can be distributed prior to the meeting.

Preparing Meeting Papers: The success of a meeting comes down to planning. As actual meeting times are quite restricted, all participants must be aware of, in advance: The purpose of the meeting Any background information Topics for discussion Their role in the meeting.

Preparing Meeting Papers: Preparing and distributing meeting papers

In order to prepare participants you may be required to:

- Prepare agenda
- Prepare presentations
- Prepare background notes
- Give to staff, suppliers and other interested parties
- Give to participants.

Preparing Meeting Papers.....

Confidentiality of information In many cases, any information that is to be given to participants, is confidential and not for distribution or viewing to anyone. This may include: ● Strategic plans ● Financial information ● Information about customers ● Staff movements ● Salary information ● Operational matters ● Marketing and promotional materials. Conduct Meetings: Performance Criteria for this Element are: ☐ Chair meetings in accordance with enterprise procedures and meeting protocols ☐ Encourage open and constructive communication ☐ Reach agreement with meeting participants on meeting goals and conduct ☐ Present information and ideas clearly and concisely. ☐ Give all participants the opportunity to contribute ☐ Manage meetings to maintain focus on agreed goals ☐ Conduct meetings within agreed times, or adjust times with the agreement of participants 36 ☐ Record the minutes of meetings accurately, where appropriate. Chair Meetings: Whilst meetings are extremely valuable and effective avenues in which to share information, make decisions and agree on strategies that will shape the future direction of a business It is vital that they are well managed Most meetings will have a person running it This is normally the person who called the meeting in the first place This person will assume the role of the ‘chairperson’ regardless of whether they give themselves the title or not. Opening Meetings: Always start on time and state that sticking to the agenda and its timeline is important ☐ Welcome attendees and thank them for their time ☐ Make introductions ☐ Clarify your role in the meeting ☐ Review the agenda ☐ Allocate someone to take minutes ☐ Start the meeting in a positive and enthusiastic manner. Maintaining Control: The three most common reason meetings get out of control are: Disagreements and differences of opinion when making decisions Talking about topics that are not relevant Spending too much time on a particular agenda item, at the expense of other items. Open and Constructive Communication: Meetings are only as good as the ideas that the participants bring forward Great ideas can come from anyone in an organization, not just its managers It is no point having people attend meetings if there are not able to express their views, opinions or suggestions As the chairperson, it is your role to ensure everyone is given a fair opportunity to participate in meetings. Open and Constructive Communication..... Confidentiality ● Many people generally have reservations about being honest and open if they know what they say is relayed to others after the meeting ● Critical comments, may be an important aspect of a meeting topic and the basis for ways to improve performance ● They are vital to a meeting and should be encouraged ● Establish a ground rule in relation to confidentiality. Meetings are the most common place to address problems that exist in the workplace In order to find a suitable solution, it is important to understand the causes and why things were said, or done in a certain way ● Focus on problem, not to lay blame ● Concentrate on facts not emotions All rights reserved for Applied College – Qassim University BLSA102 ● Focus on finding a solution. Present Information and Ideas Clearly: As the meeting commences, each agenda item will be introduced, discussed and actioned: ● In a clear and concise manner ● With an agreed outcome ● In the allocated time. Equal Opportunity to Contribute: The reason people have been invited to attend a meeting is because they have something important to contribute. This contribution could come in the form of: ● Making a presentation ● Providing expert advice ● Providing feedback or suggestion ● Providing criticism ● Providing acceptance and approval. Equal Opportunity to Contribute..... Fair and equitable opportunity to contribute Refer to the ground rules, which should include guidelines on listening

and allowing others to speak Allocate times for each person to contribute Provide small group opportunities that afford more people the chance to speak If a person is constantly interrupting, whether on purpose or unintentionally, handle the situation in private.

Maintain Focus in Meetings: In essence a meeting is a 'controlled conversation with a purpose'. Many meetings can go off-course due to:

- Topics taking longer to discuss
- Differences of opinion being discussed and debated for longer than expected
- new topics introduced.

Conduct Meetings within Timelines It is important that the original meeting topics, as identified in the agenda, be introduced, discussed and acted upon within the predetermined time frame One of the most difficult tasks a Chairperson has is time management. Time management techniques

- Only include items that are required in meetings
- Allocate tasks to be completed before meetings
- Start on time and end on time
- Allocate and notify times
- Ask participants to help with time management
- Allow time to decide
- Allocate to new meeting.

Closing Meetings..... When closing a meeting:

- Thank the participants for their time and valuable contributions
- Summarise the meeting topics
- Review actions and assignments
- Clarify that meeting minutes or actions will be reported.

Explain the process

- Set the time for the next meeting and ask each person if they can make it or not
- Try to end on a positive note
- Always end meetings on time.

Record Minutes of Meetings: One of the key requirements of any meeting is to record minutes Minutes are a written record of what was discussed, agreed and actioned They provide participants with a tangible record of events resulting from the meeting. In essence minutes can be likened to a photocopy of the meeting

Debrief and follow up after meetings Performance Criteria for this Element are:

- Process and distribute documentation from meetings
- Inform colleagues regarding the outcomes of meetings
- Incorporate work resulting from meetings into the current work schedule with tasks and actions prioritized, as appropriate.

Process and Distribute Documentation: Once the meeting has finished it is important to ensure the momentum gained during the meeting doesn't diminish once the meeting is over It is important to keep the momentum strong, especially in the immediate aftermath of the meeting The discussions and agreed solutions are still fresh in everyone's mind. Process and Distribute Documentation.....

Process documents Documents that need to be prepared include:

- Minutes of the meeting
- Copies of presentations
- Copies of background information
- Course of action and responsibilities
- New information to help participants achieve allocated actions
- Agenda for next meeting.

Process and Distribute Documentation..... Distributing documentation The most common methods to distribute documentation include:

- ☐ Delivered personally
- ☐ Email
- ☐ Internal mail
- ☐ Courier.

Process and Distribute Documentation..... Acknowledge receipt of documentation Regardless of the method chosen to send documents, it is important that the sender follows up to ensure: The documents have been received by the correct person The person understands what is required of them.

Inform Colleagues of Meeting Outcomes Meetings normally incorporate key decision makers, including managers and supervisors, of:

- A department
- An outlet of a department
- An area of responsibility not contained within its own department
- An activity.

Not everyone is invited to a meeting.

- Meetings normally just include just key decision makers as it would be impractical or poor time management to have all staff at every meeting

Therefore any information or actions that are discussed or agreed within meetings, that impact the operations and the way staff conduct their activities, must be communicated in a timely manner. Inform

Colleagues of Meeting Outcomes..... Types of information There are endless types of information that must be communicated to staff, through managers and supervisors, including: ● Upcoming events ● Customer information ● New policies and procedures ● New products and services ● Customer comments ● Staff movements ● Operational issues. Inform Colleagues of Meeting Outcomes..... Types of action Whilst most communication required to be known by other managers, supervisors and staff is information, at times there are direct actions that need to be taken, either: Directly by management or supervisors Through staff in consultation and direction by management and supervisors. Inform Colleagues of Meeting Outcomes..... Types of action Some types of action that must be communicated for implementation include: ● Conduct research ● Prepare a presentation ● Prepare a strategy or action plan ● Implement action ● Act on information. Unit Summary In this Unit we have explored all the steps involved in: Preparing for a meeting Conducting a meeting Communicating meeting information Implementing activities resulting from meetings. Meetings are a very important aspect of all businesses and when used correctly, is the greatest avenue to share information and to develop plans for business success.