

# Mastering Meetings

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Meetings seem to rank somewhere up there with filling the car with gas, doing laundry, cleaning your room, or going to the dentist—its just one of those things people, especially leaders, have to do whether we like it or not. And let's be honest, we've all gone to that one meeting ran so poorly we would have rather been at the dentist or cleaning our room than sitting through another boring meeting.

But, meetings do not have to be boring events you "just have to get through." They can and should be productive, dynamic, engaging, and even fun! In order to master meetings you just need to concentrate on the essential four elements of meetings: **People, Place, Plan and Process.**

## **Mastering Meetings Part I: People**

*"There are no problems we cannot solve together, and very few that we can solve by ourselves." President Lyndon B. Johnson*

The first key to meeting success is ensuring that the right people are in the room. This means having positive, energized, knowledgeable, respectful, and responsible people with a passion to get things done. If you want the right output from a meeting you must get the right input.

One reason people dislike meetings is because there always seems to be at least one negative, critical, or opinionated person who dominates conversation and squeezes the life out of meetings. You cannot just "kick them out" because democracy, diplomacy, and decency are important elements of leadership and meeting success. One tactic to try is for the team leader to meet with the negative force personally outside the meeting. People want to be heard and their views and opinions considered. Meeting with opinionated people outside of meetings is one way to recognize and hear their concerns.

Another type of person that needs to be in the room is someone who cares specifically for the meeting process. This person's goal should be ensuring that meetings are organized, fair, efficient, effective, and worth attending. They do not necessarily have to be passionate about the decisions made during the meeting, but, they do have to be committed to creating a positive environment for great people to get together and take the best action.

The key concept to mastering the "People" part of meetings is that everyone understands their role in meeting success. Regardless of the title or position meeting attendees hold, there are specific roles that must be played for optimal success.

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## *Member*

Everyone on the roll call for a meeting is a member. This means they have information, data, experience, talent, or collective accountability for the decisions and actions taken during the meeting. They share responsibility for the success of the meeting. That means being on time for meetings, welcoming new members, being prepared to report or provide feedback, and being a positive force. Great meetings are everyone's responsibility—not just the president, chair, advisor or group leader!

## *Timekeeper*

The role of timekeeper is a special meeting role assigned to help the team manage the clock. The timekeeper calls out the time remaining on each agenda item in intervals. It is the team's responsibility to manage time, and the timekeeper simply assists the team in this process. What is important is that the team leader support the timekeeper's clock management. It undermines the meeting when time expires and conversation is still allowed—especially if it is the team leader doing the talking. Set the time. Manage the conversation. Enforce the clock.

## *Recorder*

The recorder is a special meeting role assigned to help the team maintain a record of its work. For great meetings, assign two recorders or secretaries to this important job. One recorder is responsible for recording the traditional "minutes of the meeting." This is where decisions, roll call, votes, and reports are recorded. The second recorder is responsible for recording all action items and assignments determined during the meeting. After each decision is recorded the next steps and follow up action required to bring the decision to reality is recorded next.

Ideally meeting records should be recorded in a visible style (on a flip chart or using a computer and LCD projector) so everyone can confirm accuracy and completeness of records. The team leader should continuously request that recorders read back the meeting minutes and the action list so that when the meeting concludes the records are ready for distribution. Team leaders should be sure proceed through the agenda in order. Even the best recorders have a difficult time recording conversation that skips around all over the place.

## *Team Leader*

The leader of a team or meeting is the person who is recognized as the owner of the meeting process. This person has the responsibility for objectivity, fairness, and planning the meeting. The leader provides direction, initiates activities, encourages members, interprets data, and ensures action is taken. Great team leaders ensure everyone has an agenda, arrives at the meeting prepared, keeps discussion within the time allotted, ensures recorders have accurately

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summarized the discussion, and promptly follows through with attendees to ensure they have the information and action plan to fulfill their responsibilities. Another important role of the team leader is ensuring that conversation flows evenly between “quiet” and “talkative” leaders. Team leaders may share ideas and perspective, but their main task is to ensure the involvement and sound meeting process.

### *Advisor*

If your organization is lucky enough to have an advisor, it is important to realize that the advisor is NOT a member of the meeting. Advisors use their wisdom and experience to link the team to the overall organization and ensure good meeting process is learned and used. They work with the team and team leader to prepare and evaluate meetings, improve the team and meeting procedures, and help secure resources the team needs to accomplish their objectives.

When you have the right people in the meeting and they understand their special roles and accountabilities, you are now on the right track for a productive and positive experience that certainly beats a trip to the dentist any day!

### **Mastering Meetings Part II: Place**

*“If we’re growing, we’re always going to be out of our comfort zone.” - John Maxwell.  
American Author and Inspirational Speaker*

Meetings are essentially “mini-events.” In the same way that a wedding, graduation, or birthday party takes planning, décor, and refreshments to create the right mood and ambiance, the meeting location and setup should reflect the same thought and care.

The setting for meetings can encourage dialogue and contribute to inspired conversation just as much as a well prepared agenda or dynamic team leader. If the meeting room and location is well prepared, it demonstrates that the meeting and its participants are also very important, too.

The key concept for mastering the “Place” element of successful meetings is that meeting participants should definitely be in a “comfort zone” that is warm, welcome, and makes each participant feel valued. People are more likely to stretch outside their mental “comfort zone” if the proper accommodations have been made in regard to the meeting place.

Here are some of the key areas to master when it comes to the “place” where meetings are held.

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## *Greeters*

Assign volunteers to greet meeting participants as they come into the meeting. If the meeting location is difficult to locate, then having greeters assigned to welcome participants and point them in the right direction brings immediate comfort and relief to folks that have a tendency to get lost or arrive late. Greeters should be posted ideally 15-25 minutes prior to a meeting and should remain until the majority of participants have arrived—regardless of what time the meeting is scheduled to begin. Another tip is to have greeters notify the team leader via text message, walkie-talkie, or cell phone when meeting participants arrive so team leaders can keep a pulse of who is about to enter the room.

## *Signage*

Signage for meetings usually takes two forms—directional and inspirational. The more difficult your meeting location is to find the more directional signage needed to get members to the right location. This could mean posting signs on the street, in the parking lot, and all the way to the door of the meeting. And, do not forget the all important signs indicating the location of restroom facilities! The other type of signage important for meetings is inspirational signage. This could include welcome messages, quotes related to the meeting content, logos of the organization, pictures, posters, or even recognition signs congratulating meeting participants for a recent achievement. Especially helpful signs are ones that identify each element of the meeting agenda. As business is concluded on agenda items participants can then physically take down the sign during the meeting to visually show the progress of the meeting and what's left to discuss.

## *Temperature & Air Circulation*

Most meeting participants are very particular about the temperature of the meeting room. Rooms that are too hot or too cold will definitely have an impact on the success of your meeting. Studies show that an ideal meeting temperature is around 72 degrees. The team leader should arrive early enough to a meeting to assess the temperature and adjust accordingly (you might even want to consider bringing a portable thermometer). If the meeting is in a small space and will include a large number of attendees, then setting the temperature around 69-70 degrees is a good idea as the warmth of many bodies in a small space will warm the room up. And remember, if your meeting agenda involves topics likely to be controversial or include a lot of debate, the temperature of meeting participants is also likely to rise, so keep an eye on the thermometer throughout your meeting. If your meeting is going to last more than an hour, be sure to open a door, window, or bring a fan to ensure the air circulates. Fresh air can bring fresh perspectives and ideas to your meeting.

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## *Music*

Restaurants and formal events use music to set the tone and mood for a positive experience. You can use the same technique for meetings as well. Be sure to play appropriate music that will not offend or alienate meeting participants. Utilize music prior to the start of the meeting and during breaks. Meeting participants will begin to understand when the music is off it is time to get to work. Using music is an easy and pleasant way to bring order and positive spirit to the meeting place.

## *Room Setup*

Everyone in a meeting is vital to the meeting success and the seating arrangements should reflect this. Be sure to face the meeting room tables and chairs so that everyone in the meeting can be seen and heard. If laptop computers will be used by meeting participants, ensure that there is easy access to power (you might need to bring an extra extension cord and power strip). Prepare name tents and pre-position seating so that people are encouraged to sit next to new people. Be sure that flip charts, screens, or LCD projectors are setup in advance if you plan to use them to record ideas or make presentations. If your meeting involves traditions or formality like reciting the Pledge of Allegiance or other custom, ensure that these props are included in your meeting setup as well.

## *Refreshments*

Refreshments are generally a good idea. The best refreshments depend on the meeting type, timing, and rules of the room and you will want to plan accordingly.

If you are anticipating a long meeting then refreshments and perhaps even meals would be appropriate (be sure to have enough garbage cans for trash and to remove any items that can fill your meeting room with food smells!). If you are planning a short meeting (less than an hour) and are expecting dignitaries and guests then you would want to keep refreshments to a minimum. If your meeting is in the morning then perhaps coffee and juice would be appropriate. If your meeting is in the afternoon, then perhaps chilled water or iced tea is the right way to go. Some meeting rooms have specific requirements regarding the type of food and drink allowed or who is allowed to provide it. Be sure to check with your facility manager in advance as you prepare for the meeting.

One final note on refreshments is to be sure you have planned on some items of nutritional value. Not only is the value of nutrition becoming more and more prevalent in society, it also affects your meeting success as well. While candy and sweet treats are tasty, they also have tendency to spike the meeting process as blood sugar levels rise and fall. Be sure that if you are providing refreshments, that you consider the full spectrum of treats!

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Remember, in these busy times, everyone seems to be going to an endless number of meetings. Essentially, meetings are competing for participants. By mastering the “Place” part of meetings, you will create a meeting environment that participants look forward to attending instead of making excuses for why they missed.

## Mastering Meetings Part III: Plan

*“Prior Proper Planning Promotes Powerful Performance.” - Anonymous*

Football players have plays. Teachers have lesson plans. Architects have designs. Business has strategies. People who make positive things happen have a plan. Meetings are the same way. If the meeting is important enough to be held then it is important enough to be well planned.

The key concept to mastering the “Plan” element of meetings is to first think about the outcome. Answer the question, “If this were an ideal meeting, what would have been accomplished?” Then everything else from the plan to the people to the place and process all should drive toward this goal. Most meetings fail because people had to go to them—instead of people having to go make them a success.

Now that you know what you want out of your next meeting it is time to activate the other elements of your master meetings plan.

### *Call for Agenda Items*

Reaching out to meeting participants to get their ideas and agenda items prior to meetings is an important step prior to finalizing the agenda. Meetings most often get off track because participants have something important to say, but no meeting agenda item to go with it. By reaching out in advance, you give these participants the opportunity to formally “get on the agenda.” If they miss this opportunity, they have to hope that there is time left in the agenda or wait until the next meeting. If what they have to share truly matters, it will find its way to the agenda in proper fashion.

### *Agenda*

If there is no agenda, there is no reason to meet. Chefs do not jump in the kitchen and start cooking and pilots do not just hop in the pilot seat and start flying. Professionals follow a plan and well thought agendas are the plans meeting pros use to get work done. Great agendas contain the following essential components and are submitted at least one week prior to the meeting (and ideally 30 days):

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1. Name of the Organization
2. Name of the Meeting
3. Mission of the Organization
4. Date, Time, Location, and Meeting Room
5. Agenda Items (include the discussion time allocated for the item and the person(s) responsible for owning the topic). Roll Call, Minutes from the Previous Meeting, Budget Report, Old Business, and New Business are standard agenda items.
6. Notes (use this to remind people of what to bring, read, prepare, present, or think about prior to the meeting)
7. ADA Note (The American's with Disabilities Act outlines accommodations that need to be made for those who might have impairment. Ensure your meeting is sensitive to these concerns by including a phone number of who to call to make proper accommodations for their involvement).
8. Meeting Evaluation (review your meeting process at the end and seek feedback for ways to improve the next one!)
9. Next Meeting (if you have recurring meetings, be sure to determine the date, time, and location of the next meeting before you leave!)

Effective agendas promote powerful meetings. Too often people get stuck in regularly scheduled meetings that just automatically happen on the calendar. These meetings can be the worst because not showing up is taken as a sign that you do not care and showing up further endorses a bad meeting process—either way you're stuck! Take agenda preparation seriously!

### *Distribute Meeting Records*

If you plan on attendees being prepared to meet, then you have a responsibility to ensure they have the documents needed to be prepared. Key documents participants need include a roll call list of meeting participants, the most recent meeting minutes, previous agendas, and accountability charts (assignment list from last meetings). Meeting records should always be organized and accessible from at least two of the following places: printed hard copies maintained in a meetings log book; on a computer; posted on the Internet, and electronic versions emailed to meeting participants.

When you take the time to plan a successful meeting what you are doing is actually planning for successful meeting results—which is the ultimate goal of any meeting!

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## Mastering Meetings Part IV: Process

*"People who accomplish big things did small things well." - H. Jackson Brown, Jr., American Inspirational Author and Speaker*

Meetings are the place where big and small ideas are discussed, determined, and decided. If your big idea is to be completed with grace and greatness, then it only makes sense meeting process used to get there also share the same ingredients.

Meeting experts have identified four categories of meeting types that take place everyday. The atmosphere, attitude, and achievements that result from these meeting types can be traced squarely back to the meeting process.

### *Free for All*

Think chaos. Think off target. Think everyone out for themselves. Think frustration. Think loud people talking over the quiet leaders and no work getting done. The good news about this type of meeting is that people cared to show up. But, that's about it! In this type of meeting people likely showed up late and unprepared. The group leader led with little organization. Because an agenda wasn't followed (if it existed) the time keeper had nothing to time and the recorders had very few decisions or actions to record (if either position were actually appointed). This is a bad meeting and sadly—the kind of meeting we too often encounter.

### *Beauty Contest*

This meeting is characterized by one or two members of the meeting (one of them usually the team leader) showing up to a meeting organized, prepared, and ready to present their position or ideas. There is usually an agenda for this type of meeting and the "beauty contestants" have prepared to dazzle you for the amount of time they've been given. But, as the name suggests, these meetings are all about showering the one or two prepared members with recognition for their work while everyone else just sits back (and hopefully listens). There is no room for input or suggestion—just praise. No decisions are required because the one or two people have already determined "what we're going to do." While this meeting process is certainly better than the "Free for All" it's definitely not ideal for building consensus, group buy-in, accountability, and participation by the rest of the meeting members.

### *Distinguished House Tour*

Remember when you were little and went to an antique store or someone's home that was full of figurines and breakable décor? Remember what your parents used to tell you? "Don't touch anything!" This is the same kind of feeling you get from a *Distinguished House Tour* meeting. This meeting type is characterized by committees or small groups who are responsible for an agenda item, have worked hard on it, and have come to the meeting to take everyone

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else on a tour of their great effort. The “tour guides” just want you to marvel at their impressive work, but are not open to suggestion or questioning. They certainly do not welcome any challenge to their thought process. If you have ever been in a meeting where people got defensive about their position on an agenda item you have likely been to this type of meeting. The good news is that team members are working on agenda items and the meeting is not being dominated by an overactive team leader. The unfortunate news is that the collective wisdom and ownership of the group is not being accessed. Frustration can run high because the “tour guides” may feel their work is not appreciated and, conversely, people on the guided tour may feel like they were not heard.

### *Barnraising*

In the early days of America, neighbors would get together to help each other build their barns. The land owner would have a basic plan for what was to be built. But, as everyone came together the plan would often be modified and enhanced by the other farmers who were helping. *Barnraising* meetings work in the same way. Members come to meetings prepared. Other team members contribute their thoughts and ideas. There is give and take. One person’s ideas are the starting point for the entire group to build upon them and come to the best decision. These meetings are the ideal because they ask the best of each person in the meeting to share and contribute. Whether decisions are tough or easy, the entire team shares responsibility and ownership of the outcome.

Now that you know the four types of meeting processes, here are some tools to use to help you reach the *Barnraising* meeting process.

### *3D Process*

Every agenda item once discussed and determined should have the following elements recorded: Discussion, Decision, and Direction (3Ds!).

Discussion briefly summarizes key information shared and considered that helped the group reach a decision.

The Decision element of the record specifically records who motioned for a decision, that it was seconded, the exact decision made, and the vote count.

Decisions have no hope of coming to life if the next steps or Direction is not determined. Identify all the steps that need to be taken, the deadline for completion, and who is responsible for accomplishing the task.

### *Minutes & Accountability Charts*

There are two documents that should be created at each meeting which is why two recorders are ideal for a great meeting. The first document is the traditional “Minutes” of the meeting. This should mirror the agenda closely and record the

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discussion, decision, and direction of each agenda item. This serves as the official record and “memory” of the meeting.

The second document created during a meeting is a more practical working document called an Accountability Chart (AC Chart). The AC Chart is specifically collects action items that come up as a result of decisions that are made. Ideally the AC Chart is recorded in a table format (in Microsoft Word) or in a spreadsheet format (in Microsoft Excel).

The headings for an Accountability Chart are:

- Who (who is assigned accountability for getting the action item completed)
- Will Do (this is the specific task to be accomplished)
- By (this is the date that it is due)
- Report To (when the item is completed who does the person report to)
- Buddy (this is the backup person assigned to a task to help the primary assignee)
- Status (this is where progress can be recorded at future meetings)

### *Parking Lots*

Parking lots are the place where you park good ideas, questions, or comments that are not on the agenda. A great agenda and meeting will often spark other ideas. By using a parking lot your meeting can capture the great idea for discussion later in the agenda.

Use a flip chart to write down the term “Parking Lot” and then give everyone Post-It notes at the beginning of the meeting. If someone has an insight or idea to share that is not necessarily related to the agenda topic, they can quickly write a note and park the idea for later consideration.

### *Comment Cards*

In every meeting there are always quiet leaders and talkative leaders. Some people are writers and some people are speakers. Quiet leaders often have something to say, but for one reason or another reserve their comments for places other than meetings. Using comment cards gives everyone in a meeting the ability to voice their perspective or concerns in a safe way. Place comment cards at each persons seat and encourage them throughout the meeting to use them to share their ideas.

Another use of comment cards is to help the meeting recorder capture a motion or idea exactly as it should be recorded in the minutes. It can be helpful as an idea is being discussed for one member of the meeting to capture the key thought or decision in writing, read it aloud to the group, and if everyone agrees, send over the comment card for the recorder to log it in the meeting record.

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## *Red Flags*

Red Flags are used to indicate “warning.” If for some reason the meeting strays off course or the meeting topic heads into unsafe waters, every meeting member has the ability to wave their “red flag” to halt the meeting progress and share their concern. Pass out one red piece of paper to each meeting participant. Give instruction that the red flag can only be used one time per meeting per participant.

It’s been said that the difference between ordinary and extraordinary is that little “extra.” By taking the time to master the four meetings elements of people, place, plan, and process you will be on your way to meetings that matter. In a world filled with ordinary meetings, wouldn’t it be great to be part of one that is extraordinary!

## **Mastering Meetings Tips & Tricks**

- ▼ Meetings should always start with the mission of the organization. The purpose of the meeting and objective should also be clearly stated so everyone is focused in the same direction.
- ▼ Member roles should be reviewed so that everyone remembers their responsibility and expected contributions.
- ▼ Always assign a time limit to each area of discussion before beginning with the agenda item. It is okay to extend the discussion time, provided that everyone agrees. It is also appropriate to limit individual member discussion time.
- ▼ The team should always identify meeting ground rules before any discussion begins (e.g. one person speaks at a time, no note passing or side conversation, etc.)
- ▼ Encourage members to keep discussion focused. If an idea comes up unrelated to the one under discussion—put that idea in the “parking lot” and come back to it later. Don’t get distracted.
- ▼ The leader should feel free to take quick, unscheduled breaks if the attention or effectiveness of the meeting declines. A general rule is a quick 5 minute break for every 45-60 minutes of meeting time.
- ▼ If a meeting is not effective, it is most likely due to meeting process. The leader should feel free to take control and stop the meeting to focus back on the team ground rules, timekeeping, or other meeting process. Simply forging ahead only wastes time and energy.

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- ▼ The meeting should never end without reviewing the meeting summary, previewing the next meeting agenda, and evaluating the team's process and meeting effectiveness.
- ▼ Decisions made by consensus rather than voting have a better chance of acceptance, buy-in, ownership and successful implementation. Voting is quicker, but it alienates. Consensus is deeper, but it takes longer.
- ▼ Members should take notice of body language from other members as a gauge of how the meeting is progressing. Also, keep track of those quiet members. Quiet members are many times over powered by the more vocal members and often have a wealth of knowledge waiting to be tapped. Invite their participation early—it will save a lot of time.
- ▼ Disagreement is a sign of a good meeting. Disagreement breeds creative thought and opens the door to innovative plans and group ownership. However, it is important the disagreement be constructive not destructive. Disagreement should always be professional, not personal.

*About the Article Author: Ryan Underwood is a leadership expert and Leadership Fellow at TRI Leadership Resources. He has served on more than 50 boards and committees and serves a full spectrum of clients ranging from The White House to the home of Mickey Mouse at Disneyland with dynamic and engaging meeting services. He is recognized as a dynamic facilitator, speaker, and event manager by schools, nonprofit, government agencies, and corporations across America. Email [ryan@teamtri.com](mailto:ryan@teamtri.com) for complimentary resources, tools, and templates to master your next meeting.*