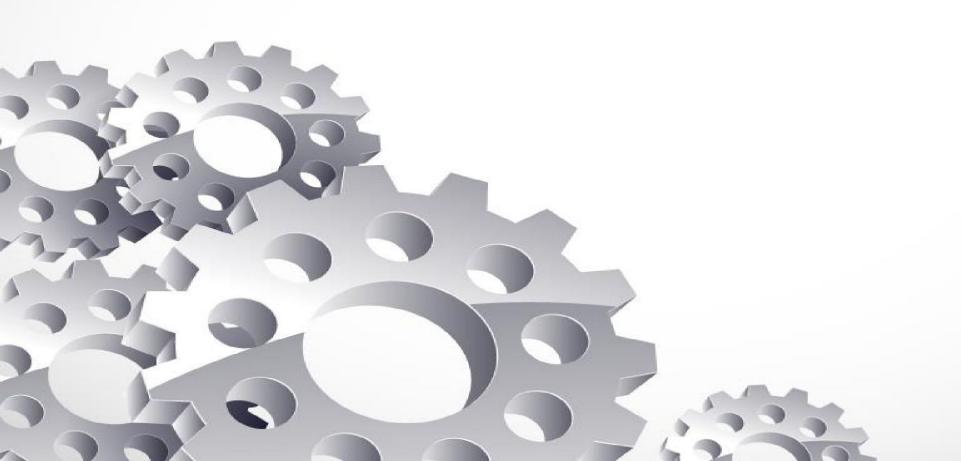
Business Meeting



Week-9

- Definition of Meeting
- Types and Purposes of Meetings
- Reasons for Holding Meetings
- Essential Meeting Elements: Before, During, and After Meeting
- Leader's Role: Before, during, and after meeting
- Participant's Responsibilities

What is a Meeting?

 A scheduled gathering of group members for a structured discussion guided by a designated chairperson.

• Business meetings are generally conducted in person in an office, however with the rise of video conferencing technologies, participants can join a business meeting from anywhere.

Types of Group meeting

Informal Group

Unplanned, free flowing meetings or get togethers for social purposes which may later develop into formal meetings

Formal Group

These are task oriented groups, often search for solution to problems, look for a course of action, make recommendations to a higher authority

Reasons for Holding a Meeting

- 1. Conducting business that cannot be conducted effectively by other means such as a board meeting
 - 2. Information sharing, such as a meeting of the membership
- 3. Solving a problem or decision making, such as determining how to solve a problem that affects the entire membership
- 4.Planning, such as a strategic planning meeting or planning an education program
- 5. Gathering feedback to solicit opinions and ideas about programs and services, such as a focus group meeting

- There are four primary purposes for meetings.
- Informationsharing: During information-sharing meetings, groups get together to give updates, share research, and brainstorm for new ideas. Typically,no decisions are made in an information-sharing meeting.

• **Planning**: Planning meetings involve taking ideas to the next step. Participants can collaborate on goals, visions, priorities, and needs, and define next steps.

• **Problem-solving**: During problem-solving meetings, teams collaborate on developing solutions to problems within the practice. Participants gather data, identify problems, analyze the situation, and plan for action.

• Relationship building: This type of meeting serves as a time for people to get to know and build relationships with one another

1. Informational Meetings

- these meetings seek only to clarify, make something clear, to give information.
- examples: changes in the reporting procedure in the purchasing department
- anouncement of the new mission statement
- At these meetings the members: learn, ask questions, try to understand
- The purpose of participation in such meetings is to be informed, to understand the situation.

2. Suggested Solution Meetings (Planning)

- These meetings are exploratory and informational.
- Possible solutions are enquired.
- Possible solution(s) of a problem is discussed.
- Afterthis meeting, a final recommendation is prepared for higher approval or group consensus.

3. Problem-Solving Meetings

- Authorization for a Committee
- Methods of Solving Problems in Meetings:
- 1. Background Analysis:
- i.State the problem or question in an affirmative tone.
- ii. Define and limit the problem
- iii.Collect facts on the history of the problem

- 2. Solution Discovery:
- i. Establish Criteria
- ii.List possible solutions through brainstorming

3. Solution Evaluation

Arrive at a solution Work on the pros and cons of all the previous solutions listed Use rational approach

4. Choice of Action:

This is the execution phase, where we keep in mind timelines and costs involved



Types of Meetings

- **Board meeting:** A meeting of a company's board of directors to discuss strategic decisions and governance issues.
- Brainstorming session: A meeting to generate ideas and creative solutions for a particular problem or challenge.
- Client meeting: A meeting with clients to discuss their needs and expectations, provide updates on projects, and resolve any issues.
- **Performance review:** A meeting between a manager and an employee to discuss the employee's performance and set goals for future performance.
- **Project meeting:** A meeting to discuss progress and issues related to a specific project

- Sales meeting: A meeting between sales team members to discuss strategies, goals, and potential deals.
- **Staff meeting:** A meeting for employees to discuss issues related to their department or the company as a whole.
- **Team meeting:** A meeting for a specific group of employees to discuss project progress, goals, and roadblocks.
- Town hall meeting: A meeting for employees to discuss company-wide issues, share ideas, and receive updates from upper management.
- Training session: A meeting for employees to learn new skills or receive training on new technologies, processes, or tools.

Activity: Identify the type of the meeting

- You work for a small coffee shop company with a few coffee shops in town. You would like to add some food. You want to get some ideas from your team.
- You've just reorganized the management team in your organization and you want to explain it to your department.
- You want to select a new software program for your design team.
- Your international sales team needs to have its monthly meeting.

• Exercise on Page no. 3

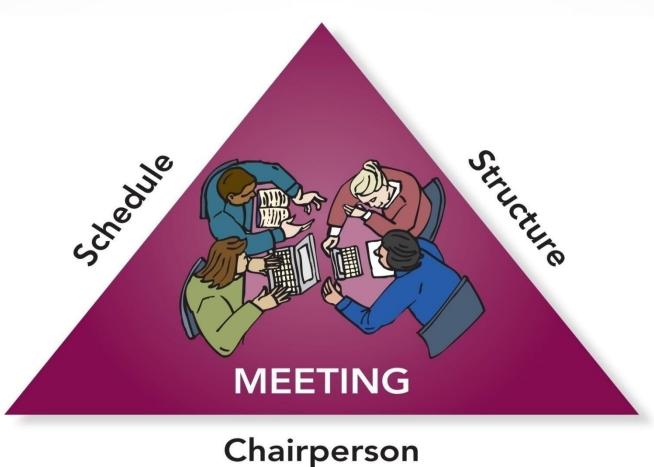
• Planning is one of the essential keys to an effective meeting.

Time invested in advance of the meeting will save time during the meeting and help to assure the meeting's productivity.

Before deciding to have a meeting, it is important to ask the following questions:

- Is a meeting necessary?
- What is the outcome we need to achieve?
- Is a meeting the best way to achieve the outcome?
- •Are there other ways to achieve the outcome such as by phone (conference call), written means, electronic mail, or a virtual meeting via the Internet?

Essential Meeting Elements



From a participant's response, identify the issues with the meeting.

• We didn't start for 20 minutes because people were just chatting and then the meeting went on for an extra hour. One of the participants wouldn't shut up. No-one else was able to speak. I didn't really know what we were supposed to be talking about, and at the end I didn't know what we had decided. I felt it was a complete waste of time. I came prepared because I had read the documents that we were supposed to discuss, but it was really clear that a lot of other people at the meeting hadn't read them. Some of them didn't even bring the documents at the meeting. I felt so frustrated.

From a participant's response, identify the issues with the meeting

• I wanted to contribute because I thought I had a few good ideas, but I didn't feel comfortable giving my opinion, so I just kept quiet. The meeting room was small so we were all sitting really close together. There was also construction work going on outside so it was hard to hear.

Essential Meeting Elements

Steps before meeting:

- Define the purpose of the meeting
- Select participants
- Determine the best modality for the meeting
- Set the meeting location
- Determine the meeting duration
- Create the meeting agenda

Determine meeting type and purpose Prepare agenda Identify attendees Decide for a suitable time Select a convenient venue Sending meeting announcement

The Need for Agendas

Agenda

The outline of items to be discussed and tasks to be accomplished during a meeting

An agenda . . .

- is an organizational tool.
- helps members prepare for a meeting.
- is a time management tool.
- provides a measure of success.

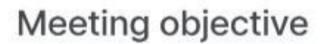
Preparing agenda

- The agenda will be provided by a superior, but in the form of vague instructions.
- The concerned attendees are also consulted to suggest agenda items.
- The concerned attendees are also contacted to decide for a suitable time.

Preparing agenda

- Agenda items must be clear.
- The items must start with a **nominalization** (noun made from a verb) or a **formal action verb**, e.g. "Vote on Approval of Next Year's Budget".
- In less formal team meetings, agenda item can be phrased as questions or statements, such as, ""Which design do we prefer?" or "Decide whether to request an increase in our marketing budget".
- The agenda item may also mention the name of the person responsible to brief about that particular item.
- The last item is usually "New Business" or "Any other matter" to allow participants to discuss any other issue related to the purpose of the meeting.

Sample agenda



Develop our content marketing strategy for the next year.

Agenda

■ Before the meeting: All participants are expected to review last year's

Left Content performance report.xlsx.

- Review last year's performance (15 min)
- Share topics requested by the sales team (10 min; @Name)
- Present latest competitor content gap analysis (15 min; @Name)
- Get feedback on the new content plan proposal (15 min; @Name)
- Recap of decisions and next steps (5 min)

Table 8-1 Sample Board Meeting Agenda

Professional Association, Inc. BOARD MEETING AGENDA

February 21, 20xx Tampa, FL

- Call to Order and Introductions President (10 minutes)
- II. Appointment of Timekeeper President (1 minute)
- III. Business
 - A. (topic, person presenting, and timeframe)
 - B.
- IV. Consent Agenda ALL (15 minutes for questions/comments)
 - A. Committee/Task Force Reports (list of reports)
 - B. Approval of Minutes
- V. Meeting Evaluation
- VI. Announcements
- VII. Next Meeting Date, Time, Place
- VIII. Adjournment

Work on the following message by a superior to develop the agenda

• Hey Erik. Karin here. I just wanted to let you know that I'm going to be out of the office for about ten days and wanted to ask if you could organize a team meeting for the first week of next month. As well as our regular updates I'd like us to discuss the remodel of the Northlake store. We need to give input on which design we prefer. I'd also like us to decide if we need more money in our budget, so it would be good if you could invite Lauren to join us too. Thanks and let me know if you have any questions. You can call me on my cell. See you in two weeks.

• Exercise on page 13-17

Chairperson's Pre-Meeting Tasks

- Review the problem and determine the precise purpose
 - Decide who should participate
 - Arrange for meeting date, Time and place
 - Create an agenda
 - Distribute the announcement for the meeting
 - Check on physical arrangements
 - Prepare for discussion

Communicating With attendees

- Inquiring about availability
- Asking for agenda items
- Informing the concerned participant to come prepared if s/he requires to report about a matter or manage discussion about a matter

Read some email message extracts and determine the writer's purpose

- I need to schedule next month's team meeting. I'd like to set up a meeting for next week.
- I'm trying to arrange a meeting for sometime next week. I want to find a time for us to meet.
- I'd like to propose Monday, May 2nd at 10 a.m. How about Thursday afternoon at 2:00? Would Wednesday at 9:00 work for everyone?
- Here are some options, let me know what you think. Which of these days and times work for you? Let me know which of these dates you prefer.
- Please let me know when you are available. When is a good time for you? Can you give me some times when you are free?

Writing the meeting announcement email

- Write a clear subject line.
- •Greet the participants, e.g.

Dear All/Colleagues,

Hope you are doing well.

- Provide the details of the meeting (meeting name (if any), purpose, date, time, venue).
- Announce meeting agenda.
- Instruct participants about any research or preparation that will be needed on their part. Also, mention names if necessary.
- End with a cordial statement.

Sample email

Hi Marc,

I hope you have been well.

I would like to invite you to attend our annual general meeting (AGM) on Friday 6th of April 2018 at 11am.

The meeting will be held at Level 2, 44 Genway St, Sydney NSW 2000.

Please find attached a meeting agenda.

As the meeting will likely last longer than 3 hours, we will provide some refreshments for all attendees.

Please let me know if you will be attending the meeting by 15th March 2018.

You can accept or decline the invitation by clicking this link.

Cheers,

Sample email



#6 Type of Meeting: Morning Meeting

Subject: Meeting Invitation for Monday, March 29th at 9:00 AM CST/10:00 AM EST:

Morning Meeting

Text of Message:

Please attend this meeting for a discussion of our priorities for this coming week, goals, performance updates, and issues. Breakfast and coffee will be available. An agenda is attached, and any suggested additions to the agenda should be submitted to Jennifer by 10:00 AM CST/11:00 AM EST on Friday, March 26.

Date: Monday, March 29, 2021

Time: 9:00 AM - 10:00 AM CST/10:00 AM - 11:00 AM EST

Location: Second-floor conference room

Sample email



<u>Subject:</u> Meeting Invitation for Monday, March 29th at 9:00 AM CST/10:00 AM EST: Brainstorming Meeting

Text of Message:

Please attend this meeting for a brainstorming session on how to achieve our sales and safety goals. We will be breaking into small groups for timed sessions, so it is critical that everyone is present, and on time. Breakfast and coffee will be available. An agenda is attached, and any suggested additions to the agenda should be submitted to Alex by Friday, March 26.

Date: Monday, March 29, 2021

Time: 9:00 AM - 10:00 AM CST/10:00 AM - 11:00 AM EST

Location: Second-floor conference room

TASK

• Assume that you work for a software house. Your boss sends you this message instructing you to organize a meeting. Read the message and create the agenda for this meeting. Write the agenda in your answer copy using the format taught in the course.

"Hi there. I hope you are doing fine. I want you to organize a meeting. It will be a team meeting. We have to discuss progress on the game development project. Also, Ramadan is about to start, so I need the team's input for the new office working hours. We also had to go through the performance of the website, e-store, we built for Lemon Bookshop. See you then. Take Care."

Responding to meeting announcements/agenda item calls

- Always respond to the meeting invite (Acknowledged/Noted with thanks).
- You can suggest agenda items.
- You can request for change of timings.
- You can apologize for not being able to attend. But, in this case mention your genuine reason.

Task

• Assume that your group leader has called a meeting on Friday from 2 pm to 3 pm. Write brief email responses for the following scenarios by creating imaginary details. Do not write more than 2 sentences.

- You are Shan and you cannot attend the meeting. Write an email to inform the leader about your inability to attend the meeting.
- You are Farah and you want to add an agenda item. Write an email mentioning the item.
- You are Rizwan and you want to request for change of timing as you want to attend the meeting. Write an email making the request.

Read these responses and identify their purpose

- Hi Karen, I'd like to add some time to talk about the new store. We probably need about 15 minutes.
- Hi, Karen. I would like to add an item to the agenda. I think we need to discuss next month's advertising campaign. I'm not sure how long we need, but I think it's important.
- Dear Lauren, I am writing to let you know that I am unable to attend next week's meeting. I have a previously scheduled appointment on that day.
- Dear Lauren, I'm writing to inform you that unfortunately, I am unable to attend next week's meeting. I'm going to be out of the office on Monday. I'm on vacation all next week. My apologies. I'm sorry for any inconvenience.

D - - - 10

Participating in meetings

Be an interested and useful participant

Demonstrate your abilities and competence

Read the agenda and do the homework

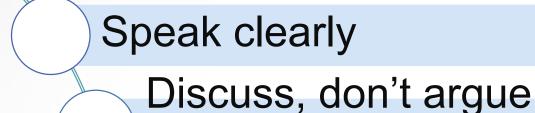
Arrive on time

Express opinions with tact and firmness

Support the chair in improving the quality of the discussion

Listen actively

Participating in meetings



Avoid personal attacks

Use positive body language

Take notes

Chairperson's Tasks During the Meeting

- Begin on time
- Delegate minutes
- Follow the agenda
- Facilitate the discussion
- Provide closure



Chairing a meeting

Introduction

- Greet and socialize
- -Begin with roll call
- Introduce participants with each other (if new)
- Delegate minutes
- State the objective of the meeting
- -Bring up agenda item 1 and start discussion



Chairperson's Tasks During the Meeting

- -Begin with an opening statement
- Stimulate discussion
- Understand the roles of the participants
 - Nonparticipating Member
 - •Know it all Member
 - The Long-Winded Speaker
 - The Erroneous Member
- Interpret data for solution evaluation
- State the major conclusions and plan of action



- move the discussion along
- control those who talk too much
- encourage those who talk too little
- control time
- Ask participants by name to respond if they are inactive
- Observe participants' non-verbal feedback and identify confusions and address the issue
- Summarize key points of after every agenda item for clarity and build consensus

Chairing a meeting

- For difficult participants, keep calm and don't lose your composure. Deal with them professionally.
- Use the agenda items to keep everyone focused and avoid distractions.
- Be fair and a good role-model by demonstrating work ethic.
- Recognize contributors by valuing their insights.
- Maintain high standards regarding discussions.
- Maintain discipline by requesting participants to avoid cell phones or talking to each other.
- End on time.
- End with a summary of decisions and actions items.

Chairperson's Post-Meeting Tasks

- Evaluate the meeting
- Distribute the minutes
- Monitor assigned tasks



Common Disruptive Behaviors

- Nonparticipants
- Loudmouths
- Interrupters
- Whisperers
- Latecomers
- Early Leavers



Dealing with Loudmouths

How to deal with loudmouths:

- Acknowledge that you understand their positions.
- Interrupt them and shift the focus to other members.
- Tell them the group needs input from everyone.
- Assign them side-line tasks (e.g., taking minutes) that shift them from talking to listening and writing.

How to Deal with Disruptive Behavioral Problems

• Nonparticipants:	223
• Interrupters:	
• Whisperers:	
• Latecomers and Early Leavers:	

Quiz

If members are frequently late to meetings, the chairperson should...

- a) wait to start until all members have arrived.
- b)review what has been accomplished whenever a latecomer arrives.
- c)let latecomers sitwithout participating until they have observed enough to be able to contribute.
 - d) publicly reprimand latecomers.
 - e) assign latecomers tasks that no one else wants to do.

Quiz

In order to run a successful virtual meeting, you should...

- a)begin a virtual meeting by reading the meeting agenda out loud.
- b) invite more people to participate.
- c)make sure that all members have access to the technology and know how to use it.
- d)use technology you've used before so you don't have to worry about testing it prior to meeting with the group.

Preparing the Minutes

The minutes of a meeting are . . .

- the written record of a group's discussion and activities.
- legal documents as well as historical records of organization business.
- a way to share what happens with members who don't attend.
- a way to prevent disagreement over member assignments and group decisions.

What to Include in the Minutes

Name of the group
Date and place of meeting
Names of attending members
Name of the chair
Names of absent members

Time the meeting was called to order Time the meeting adjourned Name of person preparing the minutes Summary of discussion and decisions including action items

Taking Minutes

- Write clearstatements that summarize the meeting's main ideas and actions.
- Worddecisions, motions, action items, and deadlines exactly as the group makes them.
- If in doubt, ask the group for clarification.
- Attach the agenda and any reports to the final copy of the minutes.

Guidelines for Taking Minutes

• Report the facts and all sides of a discussion accurately.

• Always keep in mind that the minutes are a *public*

Sample of Informal Minutes



Domestic Violence Class Discussion Group Meeting February 10, 2009, in Library Conference Room 215

Present: Gabriella Hernandez (chairperson), Eric Beck, Terri Harrison, Will Mabry, Tracey Tibbs

Absent: Lance Nickens

Meeting began at 2:00 P.M.

Group Topic: The group discussed whether emotional and verbal abuse should be included in the project. Since we don't have much time to do our presentation, we decided to limit the topic to physical abuse only.

Research Assignments: Since the assignment is due in two weeks, we decided to divide the issue into different topics and research them on our own.

Action: Eric will research why people stay in abusive relationships.

Action: Gabriella will research the effects on the children.

Action: Terri will find statistics and examples of the seriousness of the problem.

Action: Will is going to find out why and how the abuse happens.

Action: Tracey will find out what resources are available in the area for victims.

Members will report on their research at the next meeting.

Absent Members: Lance has not been to the last two class meetings. We don't know if he is still going to participate in the group. *Action: Gabriella will call Lance.*

Class Presentation: We need to think of creative ways to make a presentation to the class. The group decided to think about this and discuss it at the next meeting.

Next Meeting: Our next meeting will be at 2:30 on Tuesday, February 14th, in the same place. *Action: Terri will reserve the room.*

The meeting ended at 3:15 P.M.

(Meeting notes taken by Tracey Tibbs)

Post-Meeting Evaluation

- Was the meeting's goal clear?
- Was the agenda useful and followed?
- How prepared were group members?
- Did everyone have an equal chance to participate?
- Did members listen effectively and consider different points of view?
- Were assignments and deadlines made clear by the end of the meeting?

Additional Evaluation Questions

What other evaluation questions would you add to those on the previous slide?

- •Example: Did the meeting begin and end on time?
- •Example:
- •Example:
- •Example:

Techniques for participating in a Meeting

- Follow the agenda
- Participate
- Do not talk too much
- Cooperate
- Be courteous



Participant Responsibilities in Meetings

- Preparation for meetings
 - −Do your homework
 - -Collect information
 - -Check data
 - -Confirm conclusions
 - -Be over-prepared



MEETING RULES

10 Grand Rules for Meetings



MEETING RULES

Project Meeting Rules

Pre-Meeting Rules

- Formulate rules of business (ROB)
- Schedule recurring meetings in advance
- Have a purpose for each meeting

During Meeting Rules

- Chair, manage and lead, with authority
- Communicate for effect/impact
- Stick to the agenda and the ROB

Post-Meeting Rules

- Finalize & publish MOM asap
- Follow up on deliverables and time limits
- This is a sample text that you can edit.



MEETING RULES You are responsible for our success. Think how it One person CAN be speaks at a done, not time how it can't Be flexible in Be What is said your thinking supportive - out of box here stays of all thinking is here opinions required Be on time Phones and Think Details, when Details, computers process, not returning Details off personality from breaks

ONLINE MEETING ETIQUETTES



ONLINE MEETING ETIQUETTES

Tips to Run a Successful Virtual Meeting

Be Humane

Ask the participants about the wellbeing of their friends and family.

Be Respectful of Colleagues Time

Set clear objectives.

Be precise and to the point.

Use Video Tools

Zoon, Skype, MS Teams.

Provide An Audio Dial-In Option

Video conferencing needs a strong internet. Keep the option of participating via audio.

Test The Technology Ahead of Time

Before the meeting, participants must familiarize themselves with the software they are using.

Ensure Everyone's Point of View Is Heard Introverted participants might net proactively contribute.





BUSINESS MEETING RECAP

Org./ Committee Name John Doe / Jane Doe Date DD/MM/YYYY **Presenter Name** John Doe / Jane Doe Location Sample text This is a sample text that you can edit. You can change font (size, color, name), or apply Approval of minutes from last meeting any desired formatting. Open Issues **New Business** Open issue/summary New business / of discussion summary of discussion

Adjournment

Minutes submitted by

John Doe / Jane Doe

Minutes approved by

John Doe / Jane Doe

EFFECTIVE MEETINGS

Your Guide to Effective Meeting



EFFECTIVE MEETINGS

8 Basic Tips for Effective Meeting











Time-keeping + share of each member's time



Avoid Monologues, engage people



Avoid / discourage usage of personal phones



Follow-up on open points/ actionable