Organizing Meetings and Writing the Agenda

Have you ever had to set up a meeting? How was it? Did you like having to do it? Actually, I think a lot of people don't really look forward to organizing meetings. Probably the main reason is that we have to try and find a time when everybody is available to meet and that is often the most difficult part. But, once we've agreed on a time, we can just follow some guidelines to make sure that people come to the meeting prepared and ready to participate. So, let's talk about what we need to do. First, let's take an example from a company. Karen is the Chief Marketing Officer at Ranier Chocolates. She calls Eric, a member of her team and leaves a voicemail. Karen wants Eric to arrange a meeting. What does Eric need to do? Listen to the message for details about when, what and who. Write notes.

>> 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. >>

So Eric has to organize a team meeting for next month. They will have short updates and then discussions about the remodel of the Northlake store and the budget. Lauren will also be invited. Now let's talk about what he needs to do to set up the meeting. First, we need to know what kind of meeting it is, and what the purpose is. Then we should decide who the attendees, or participants, are. In addition to the members of the team, Karen also told Eric to invite Lauren. So, the next step is to find a date and time for the meeting. In some organizations, meetings are often set up through scheduling software such as Google Calendar or Microsoft Outlook. Employees are required to post their schedules on a calendar so that the organizer of a meeting can easily see when people are available. But sometimes this might not be possible. Some people might not be good keeping the schedule up to date. And if you're inviting someone from outside the organisation or team, they might not use the same software.

A good meeting email must have a clear subject line such as scheduling next month's team meeting. The subject line should be a noun phrase, that tells the reader what the email will be about. Next, there should be an appropriate greeting for an email to a group of people. The purpose of the email is then in the first line. Here are some examples of how we can do this. >> 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. >> Notice the verbs we can use with the word meeting. Schedule, set up, and arrange. Then we need to try to organize the time. You can choose a date and time, and asked if this would be okay. Here are some phrases you could use to suggest a time and then check. >> 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? >> Sometimes you might want to give some choices and ask which one people prefer. >> 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. >> Also you could ask people to give you

suggestions of the best time. >> Please let me know when you are available. When is a good time for you? Can you give me sometimes when you are free? >>

Of course, asking for suggestions is more complicated, because all of you need to agree on the best time. It's also a good idea to give people a deadline for letting you know about the date. >> Could you let me know by tomorrow if that doesn't work for you? >> We use, by a time, to say that we want something done before that time. Once the time has been arranged, we need to decide on the location. You'll need to think about how many people will be there and also what equipment will be needed. You should also decide what handouts are necessary.

So now we know the kind of meeting, the time, the location, the attendees, and what equipment is needed. The next step is to prepare the agenda. As we learned in our previous lesson, having an agenda can help a meeting be successful. So let's see how to create one. First, an agenda should include the title of the meeting at the top. This lets people know what kind of meeting it will be. Sometimes, in more formal meetings, you would also include the name of the company. Then, you should write the details of the meeting, the date, time, and location. The people who have been invited to attend the meeting will be listed next as attendees. Below this, in more formal meetings, there might be a space to list anyone who will not be attending the meeting. They will have told the meeting organizer before that they will not be able to attend. This can be listed as excused or apologies.

Next, we list the items to be covered in the meeting. In a more formal decision making meeting, for example a board meeting, the minutes of the previous meeting will often need to be approved and that usually happens at the start of a meeting. However, this is not common in normal business meetings. In regularly scheduled meetings there is often time for people to give updates or make announcements. This is usually listed as reports, or simply, updates. Next, we continue with the main items. Remember, as we learned in the previous lesson, each item should be clear so that the participants will know what they're going to be talking about. Usually the headings for items on the agenda start with nouns like discussion, update or vote. Having a single noun like discussion won't give you much information. You need to add details like, discussion on something, or, vote on something. You can add how much time you think will be needed for each item to help the organizer run the meeting efficiently.

If a particular person will be responsible for talking about an item, you can list his or her name, too. This means the person won't be surprised when he or she is asked to lead the discussion at the actual meeting. Sometimes you can include a question to help focus people's attention on what outcome of the discussion will be. For example, which design do we prefer? Instead of a question, you could use a statement of the outcome of the discussion. For example, decide whether to request an increase in our marketing budget. However, you should be consistent. Either use all questions or all statements if you decide to do this. At the end of a meeting there is often some time for participants to talk about anything that wasn't listed on the agenda at the start. This is often listed as new business. Sometimes instead we can list it as announcements. At the end of the agenda, you can leave space for action items. Remember, these will be things that people will do after the meeting based on what was decided. If you have several items on the agenda to

discuss, you could also include space for the action item after each one. So let's review what is necessary for planning a meeting. We decide what kind of meeting it will be and the goal of the meeting. We identify the people to invite, then based on their schedules we decide on a time and location. We might have to find out what time is best by emailing the people involved. We prepare any necessary equipment, and then we write up an agenda.

Writing Announcement

So you've organized the meeting and written the agenda. The next thing you should do before the meeting takes place is send an email to everybody with details and include the agenda. At the end of this part of the lesson, you will be able to identify what to include in this kind of email. As we saw in the first part of this lesson, we should begin an email by writing a subject line. The subject line should tell the reader what the email will be about. \

Then for our greeting we can use one of these for a group email as appropriate. >> Hi Folks, Hi Everyone, Team. >> Next we need to give the details of the meeting including the time and location. This is usually done in the first line. >> Our next team meeting will be held on Monday, May 2nd at 10:00 AM in the 4th floor conference room. This is to remind you that the SoftPoint training will take place on Wednesday afternoon at 2:00 PM in 301A. >> If necessary, say whether it is a required meeting. For example, if it's a required training or an optional information meeting. Software like Microsoft Outlook allows you to show whether it is required for you to attend a meeting or whether it is optional. >> This is a required meeting. Although attendance is optional, I hope to see most of you there. >> You can also give some more details about the meeting, for example the objective. >> You'll need to choose the design team for our remodel at this meeting. >> If the participants need to prepare something for the meeting, also include as sentence about this. >> Please read the proposal before the meeting. In preparation, please look at last year's financial report. Please bring copies of the report. Handouts will be available at the meeting. >> Next, you should refer to the agenda. You can either attach the agenda to the email. >> The agenda is attached. I've attached a copy of the agenda. >> Or if there's not much on the agenda, you can also include it in the body of the email. >> The agenda is as follows. The agenda is below. >>

Sometimes you can also ask if anyone would like to add an item to the agenda. But the organizer can also do this at the start of the actual meeting. >> Please let me know if you want to add anything to the agenda. >> However, if you think you won't have a lot of time, you can say something like this. >> We have a pretty full agenda. >> You can then include a sentence to let everyone know what to do if they cannot attend the meeting. It's a good idea to also include a deadline. >> Please let me know by tomorrow if you can't attend. >> Sometimes people use the word apologies to describe not being able to attend the meeting. Although this is more common outside of the US. >> Please send apologies by the end of the week. >> Finally, finish with a friendly closing sentence. Here are some examples. >> I look forward to seeing you next week. Please let me know if you have any questions. See you all tomorrow. >> And then the closing. >> Best regards, Erik. Best, Erik. Erik. >> So now you know what to include in an email

announcing a meeting. And remember you should send this kind of email with the agenda at least 24 hours before the meeting. [MUSIC]

Exercise: Writing an Agenda

Write the agenda for a meeting you have to conduct as a class group leader. Invent all necessary details.

Review criteria

Review three other people's agendas. Use the following to review:

1. Does the agenda have a title?

2. Is the correct time and date included? (example: Wednesday, June 8th at 9:00.)

3. Was Reports/Updates listed as an item?

4. Was closing the Eastside Store listed as the next item?

5. Was deciding if they are going to hire Creative Build the next item?

6. Was increasing the marketing budget the next item?

7. Was discussing the location of the newest store the next item?

8. Was space for action items included?

9. Optional: Was a sentence or question focusing on the objective included under any of the agenda items?

10. Optional: Was New Business/Announcements listed at the end?

11. Optional: Was a time listed next to each item?

12. Optional: Is Karin listed as attending?

13. What additional feedback do you have? Comment on anything that your peer asked about.

Responding to Meeting Announcements

When you receive an email informing you about a meeting that you should attend, most of the time you don't need to do much. Except, if you're using meeting scheduling software, you would accept the meeting request. However, sometimes you might want to respond by asking a question. Here are some situations when you might need to send an email to the person organizing the meeting. If there was no agenda sent, you might want to ask about that. Imagine you are writing back to a colleague. Which of these would you probably not choose? Where's the agenda is very direct and could sound rude if you don't know the person very well. The other two

are good, let's see how we can use them. You can write something like this. >> Hi, Karin, thanks for the email. Do we have an agenda? >> If the writer forgot to attach the agenda, you could write something like this. >> Hi Karin, I think you forgot to attach the agenda. >> Sometimes the meeting email will ask if anyone wants to add anything to the agenda.

So, if you want to talk about something that is not on the agenda, send a quick email. Here are examples of how to do it. >> Hi Karen, I'd like to add some time to talk about the new store. We probably need about 15 minutes. >> Hi Karin, Can we have some time to talk about next week's training? 10 minutes is enough. >> And this example is a little more formal >> 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. >> Finally, this example is a little more indirect. >> Hi, Karen, would we have enough time to talk about last month's sales report?

Here are some guidelines for writing an email where you can say that you cannot attend. After the greeting, you'll first need to write, that you cannot attend the meeting. Here are certain examples of what to write in the first line. >> Hi Karen, I wanted to let you know that I can't come to next week's meeting. >> Here is an example that is a little more informal. >> Hi Karin, just to let you know that I can't make it to next week's meeting. >> And here's an example that is a little more formal. >> Dear Lauren, I am writing to let you know that I am unable to attend next week's meeting. >> Remember you might want to soften your message to make it sound less direct. In this case, you can use words like, I'm afraid, I'm sorry but or unfortunately. Let's see how we can add these phrases to our first sentence. >> Hi Karin, I wanted to let you know that I'm afraid I can't come to next week's meeting. >> Hi Karin, just to let you know that I'm sorry, but I can't make it to next week's meeting. >> Dear Lauren, I'm writing to inform you that unfortunately, I am unable to attend next week's meeting. >> When you say that you can't do something, you usually have to give a reason.

So, let's look at some different reasons we might have. First, we'll look at some reasons when it is impossible for you to attend. >> I'm going to be out of the office on Monday. I'm on vacation all next week. I have a previously scheduled appointment on that day. >> This is more formal language. Sometimes there are other reasons why you can't attend. Maybe you are just too busy. However, it's not a good idea to just write, I'm busy. You should give more details about what you are doing. >> I have to finish the sales report by Tuesday. >> I have the deadline for the website redesign coming up >> The reorganization of the Northlake store is currently taking up a lot of my time. >>

When you are busy, you should really give details but sometimes we don't have to be clear. It's acceptable to give vague reasons when something unexpected happens or there are personal reasons. >> Something has just come up. >> This means that something unexpected has happened. >> Due to a family commitment. >> This means, that you have to go to something like a wedding, family celebration or attend a meeting at your child's school. >> Due to a personal matter. >> Due to a personal matter is very vague, because it's personal and so, that means it's private. You're not going to say exactly what the reason is and other people are not going to ask what it is either. However, when you use this phrase, it means that it's probably

something important, not that you just don't feel like coming to work. Another expression that is more serious is "due to a family emergency". This could mean someone in your family is very sick. After giving your reason, you might also want to add another sentence apologizing for not being able to attend the meeting. Of course, this depends on your relationship with the reader.

If you're writing to your boss, you probably would want to be clear and give an apology. >> Sorry to let you know on such short notice. >> On short notice means, that you are letting the reader know that you cannot come a short time before the actual meeting. >> My apologies. I'm sorry for any inconvenience. >> This is a little more formal. Next, you'll want to end by adding a closing sentence, so that it doesn't sound too abrupt or sudden. Here are some examples. >> Please let me know what was decided. >> Anyway, I look forward to hearing what was discussed. >> I look forward to reading the minutes. >>

What about if you really want to or need to attend? Well, you could ask that the meeting time be changed. Again, you would probably ask a colleague this question, not usually your boss. As this is a special request, you'll want to make the language indirect. Let's see some examples. Notice how the request is a yes no question. >> Would it be possible to move it to Tuesday? >> Is there any chance we could push it back to the following week? >> Push back means to postpone something. >> Could we maybe reschedule it for later in the week? So to review, we've covered how to write an email asking a question about the agenda and saying you can't attend. We've seen how to give a reason and how to end with a closing sentence. >>

Exercise

In this assignment, you will write an email announcing a meeting and then respond to another person's email saying that you cannot attend.

1. Read these notes.

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Company: Eagletop Outdoors

Meeting: Weekly Management Meeting (including decision about the location of the new flagship store)

Preparation: Read/bring reports on the 3 locations.

Time: 1hr 30 minutes.

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Write an email to the management team announcing the meeting. Decide on a time and location. Mention the agenda. Ask for any questions or if the team would like to talk about anything else.

Also tell the team to inform you if they won't attend the meeting. Give a deadline. Remember to include a subject line.

3. Review three of your peers' email. Use the following to review.

1. Is the subject line a clear noun phrase?
2. Is the greeting appropriate?
3. Does the writer mention the meeting in the first line?
4. Is the objective or the type of meeting included in the email?
5. Does the writer include the time and the location of the meeting?
6. Is there a reference to the agenda?
7. Does the writer invite the readers to respond if they want to add anything to the agenda and/or cannot attend?
8. Does the writer ask the readers to prepare by reading and/or bringing the reports?
9. Is there a closing sentence?
10. Is there a closing like Best regards, and the name?
11. What additional feedback do you have? Comment on anything that your peer asked about.