GE2410

Running and participating in workplace meetings

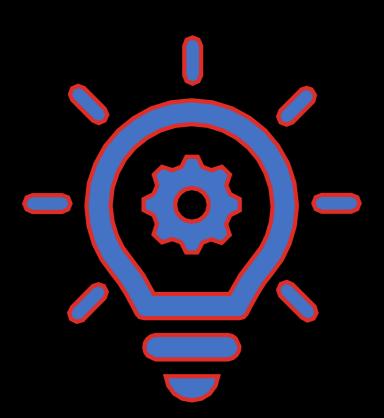
describe the purposes and structures of project meetings; and

AIMS AND LEARNING OUTCOMES

describe and apply various interaction skills needed to run and participate in a project meeting.

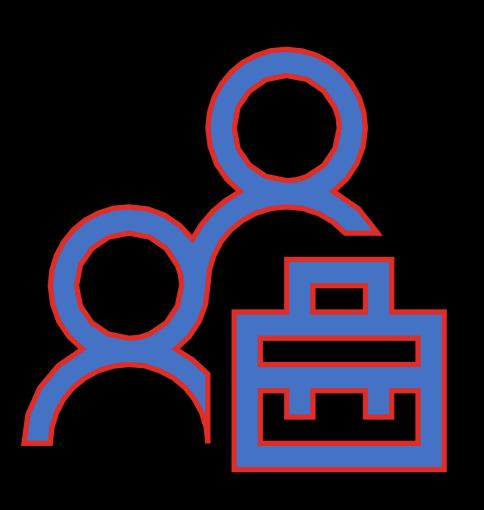
ENGINEERINGPROJECT MEETINGS

PROJECT MEETING



- An engineering project is one in which a team of experts from an engineering firm working closely with a client organization to develop and deliver a solution to a problem that the organization is facing.
 A project meeting is, therefore, one in which participants come together to discuss and make decisions on matters relating to a solution project.
- A project meeting can be run externally. By that, it means a team of experts will meet up with a team of representatives from a client organization. A project meeting can also be an internal one and involve members of a party only (e.g., a team of experts only or client representatives only.

PRE-PROJECT MEETINGS



MEETING WITH CLIENT REPS.

(INFORMATION GAP ACTIVITY COMPLETED IN WEEK 8)

PRE-PROJECT MEETINGS

Meeting with client team

The engineer team gain some preliminary understanding of the client's problem and to obtain information that can help them decide whether it is feasible to develop the solution for the client and whether the project is worth pursuing

The engineer team will design and submit a project proposal

The engineer team will hold meeting to discuss to solutions

Information Gap
Activity

Meeting with client team

PRE-PROJECT MEETINGS

The engineer team gain some preliminary understanding of the client's problem and to obtain information that can help them decide whether it is feasible to develop the solution for the client and whether the project is worth pursuing

Blueprint (Assessed Task 4)

The engineer team will design and submit a project proposal

Meeting
(Assessed Task 4)

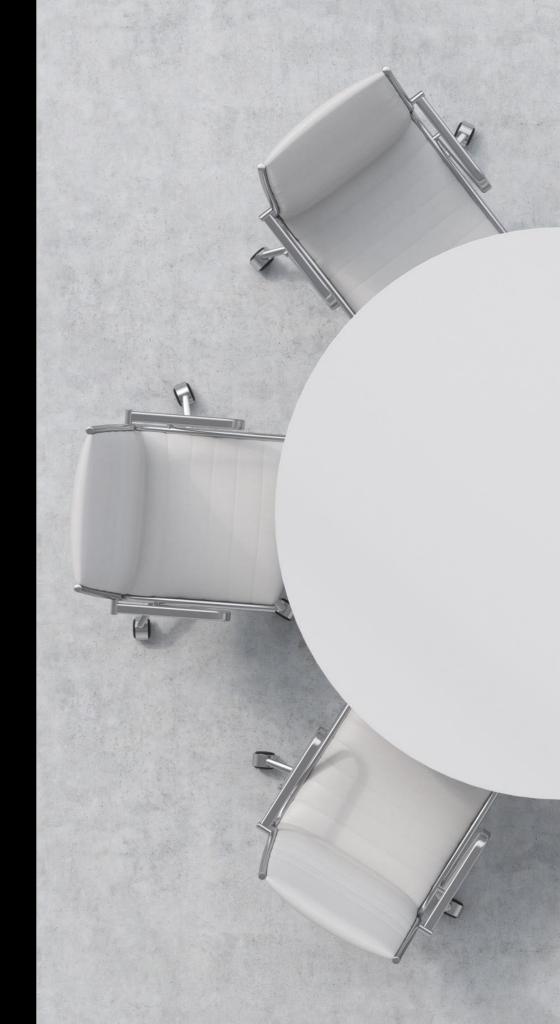
The engineer team will hold meeting to discuss to solutions



HOW SHOULD WE PREPARE FOR THE MEETING?

ENGINEERS

- Do more secondary research if needed
- Develop a blueprint of the solution requested by the client
- Set the agenda of the meeting
- Develop materials for the meeting
- Leader: Be prepared to chair the meeting



PROJECT MEETINGS





EXTERNAL MEETINGS

INTERNAL MEETINGS

The Sequence

Project stages	Participants
Pre-project (consulting)	 Project team: Project leader, sales engineer, and a few engineers.
	 Client representatives: the head of the unit that requires the solution, key players in the unit
Pre-project (contract drafting/signing)	The project team and client representatives
Project (initial)	 Key members of the project team Stakeholders from the client's organization who will be affected by the outcomes of the project (mostly end users of the solution)
Project (interim)	 Key members of the project team Stakeholders who will be affected by the outcomes of the project (mostly users of the solution)
Project (final)	 Representatives from the project team Stakeholders who will be affected by the outcomes of the project (mostly users of the solution)

Project stages	Purposes [Project team]
Pre-project (consulting)	 To gain some preliminary understanding of the client's problem To decide the feasibility of the project
Pre-project (contract drafting/signing)	 To discuss and negotiate the contents of the contract To finalize the contents of the contract To sign the contract
Project (initial)	 To gather specific details to inform the design and implementation of the solution.
Project (interim)	 To inform stakeholders the progress made in the project To present some of the deliverables being developed To obtain interim feedback from stakeholders to inform the next stage of the project
Project (final)	 To present the deliverables developed To demonstrate or train end users in the operation of some of the deliverables (where this applies) To obtain feedback from stakeholders of the project

Project stages	Purposes [Stakeholders from client's organization]
Pre-project (consulting)	 To provide details about the problem To inform the engineering firm the parameters they have set for the solution and the items that they expect the firm to deliver (the deliverables). To find out the suitability of the engineering firm
Pre-project (contract drafting/signing)	 To discuss and negotiate the contents of the contract To finalize the contents of the contract To sign the contract
Project (initial)	 To gain some understanding of the To provide details of the expected deliverables
Project (interim)	 To obtain details about the expected deliverables To provide feedback on the deliverables To monitor the development of the project
Project (final)	 To inspect (or try out) the deliverables To provide further feedback on the To learn the operation of some of the deliverables

INTERNAL MEETINGS

The Sequence

INTERNAL MEETINGS

Project stages	Participants
Pre-project (consulting)	Selected team members and sales engineer
Pre-project (contract drafting/signing)	Selected team members and sales engineer
Project (initial)	Members of different sub-teams
Project (interim)	 Members of different sub-teams Project team leader and leaders of sub-teams
Project (final)	Project team leader and leaders of sub-teams

INTERNAL MEETINGS

Project stages	Purpose
Pre-project (consulting)	To prepare for the first meeting with the client reps.
Pre-project (contract drafting/signing)	 To prepare for meetings with clients in which the contents of a contract are discussed, negotiated, drafted.
Project (initial)	 To discuss the part of the project that the team is responsible for To set targets and tasks; allocate work, set timelines
Project (interim)	 Members of different sub-teams To discuss progress made within the team To discuss issues arising within sub-teams, solutions to problems, actions to take, etc. Members of different sub-teams To update project leader and other teams on progress made in different teams, actions to take as a project team, issues to resolve, need to reallocate or readjust resources, etc.
Project (final)	 To discuss matters relating to the launching of the solution To evaluate the outcomes of the project

STRUCTURE OF MEETING

TASK 1 (P.84)

- Tables 3-5 show the prototypical structures of three types of project meetings
- Discuss with your group members what might go into each of the blank cells.



AN INTERNAL PRE-PROJECT MEETING

Stages	Key activities	Participant(s)
Opening	Stating the purpose of the meeting and items of discussion	Team leader
Briefing	 Briefing the team about the initial contact with the client organization 	Team leader
Brainstorming	 Brainstorming for the types of information to obtain from client representatives in the initial pre-project meeting Brainstorming for questions to ask 	All
Planning & task assignment	 Planning and sequencing questions to raise, Deciding on the information to pass to client representatives Deciding the tasks of each participant in the meeting with the client representatives 	All
Closing	 Summarizing actions and parties responsible for the actions Setting the date for the next meeting if needed 	Team leader

AN EXTERNAL PRE-PROJECT MEETING WITH CLIENT REPS

Stages	Participant(s)				
Opening	Chairperson (Project team leader or Leader				
	Welcoming Introducing participants	of client's team,			
	Stating the goals of the meeting	depending on who sends out the call for the meeting)			
Describing the problem	 Project team prompting client representatives to provide details of the problem and parameters 	Project team and client representatives			
Probing & confirming	 Project team seeking clarification about the problem, probing for missing information, and confirming details obtained 	Project team and client representatives			
Discussing future collaboration	 Exchanging views about the possibility of running the project 	Project team leader and leader of client			
	 Deciding initial actions to take (e.g., developing a tentative proposal, arranging a follow-up meeting, etc.) 	representatives			
Closing	Summarizing key actions to take	Chairperson			
	Setting up a date for the next meeting				

AN INTERIM MEETING WITH CLIENT REPS.

Stages	Key activities	Participant(s)			
Opening	Opening • Welcoming				
	 Stating the purpose of the meeting and items of 				
	discussion				
Presenting the	Depending on the purpose of the meeting:	Project team			
solution	 Presenting some aspects of the proposed solution 				
	 Presenting the progress made in the design of the 				
	solution				
	 Presenting some aspects of the solution that have 				
	been developed				
Discussing the	Seeking clarification, commenting on and making	Client representatives			
solution	suggestions for the solution				
	 Responding to representatives' questions, comments and suggestions 	Project team			
	Deciding on actions to take	Project team and client representatives			
Closing	Summarizing key actions to take	Chairperson			
	Setting the date for the next meeting				

PREPARATION

DUTIES OF CHAIRPERSON



sets the goal of the meeting



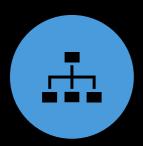
arrange the date, the time, the duration and the venue of the meeting;



prepare an agenda for the meeting (see sample on p.87)



gather the information that will be needed



assign roles and responsibilities



send out a call for the meeting to all participants. (date, time & venue; agenda; reading materials)

PARTICIPANTS

01

study the agenda

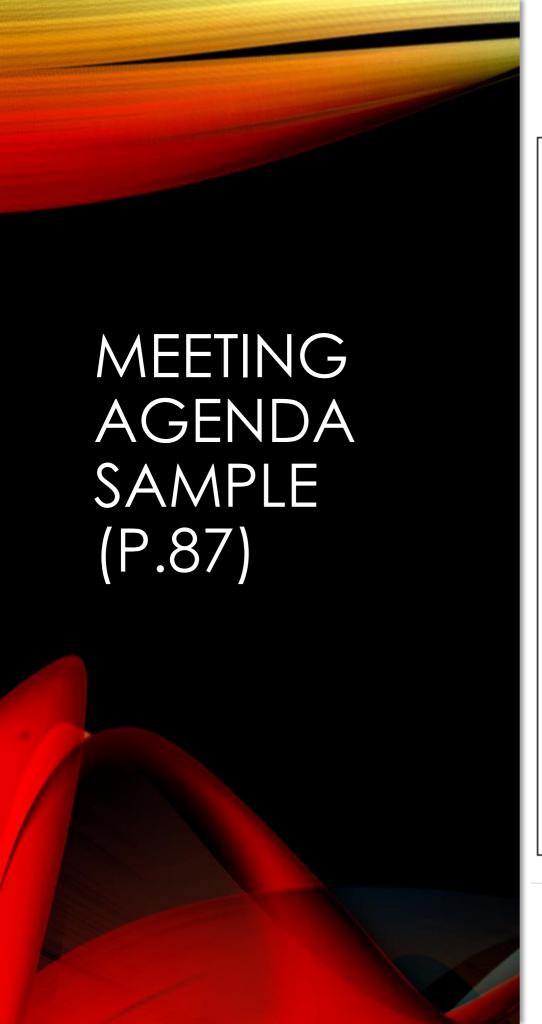
02

be prepared to discuss the items on the agenda 03

Study the additional materials

04

report as requested



A sample project meeting agenda

PROJECT STATUS MEETING AGENDA October 9, 2012 2:30 - 3:30 Room 2609, e logistics Wing E

Attendees: Patrick Kam (facilitator), Kuldeep Bhatia, Alan Gibbs, Christy Wong

Goals of meeting

- 1. To review the status of the Milestone Inc. project (Project #278)
- 2. To identify issues and risks
- 3. To discuss/decide any needed mitigation.

Items of discussion

- Project tasks accomplished/commitments being met
 - Technical status (requirements, design, code, test, documents, etc.)
 - Conflicts and issues (technical, resources, tools, schedule, cost, etc.)
 - Schedule tracking
 - Actual schedule vs. planned
 - Dependencies between groups
 - Action items (current AIs status, new AIs)*
- Project tasks upcoming in next 7-14 days
- Date of project status review meeting

^{*}AI: action items

Item 1: The participants are to brief each other work completed for each of the bulleted items; they will also need to <u>reach a decision</u> for the actions to take about the issues.

Items 2 & 3: the team is to discuss and decide collectively the tasks project 278 in the next 2 weeks. They will also need to de items 2 & 3: the team is to discuss and <u>decide collectively</u> the tasks for the next 2 weeks. They will also need to <u>decide</u> the date of the next meeting.

A sample project meeting agenda

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MEETING ETIQUETTE AND PARTICIPANTS'S RESPONSIBILITIES

6.5

CHAIRPERSON



Time management



Meeting progress



Make sure the goals are achieved



Take notes of the decisions reached and confirm with participants

PARTICIPANTS



Be proactive and contribute ideas.



Speak succinctly and do not digress.



Be open and listen to others.



Be collegial.



Interrupt at an appropriate point.



Take notes of all major decisions made.



Seek clarification and confirmation.
Don't assume.



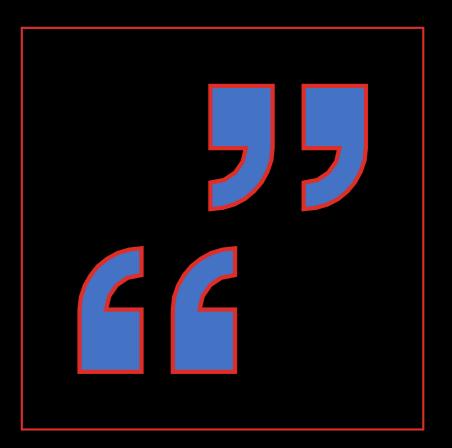
If extended digressions from an item are observed, suggest to the chair to be discussed in the AOB time



LANGUAGE OF MEETINGS

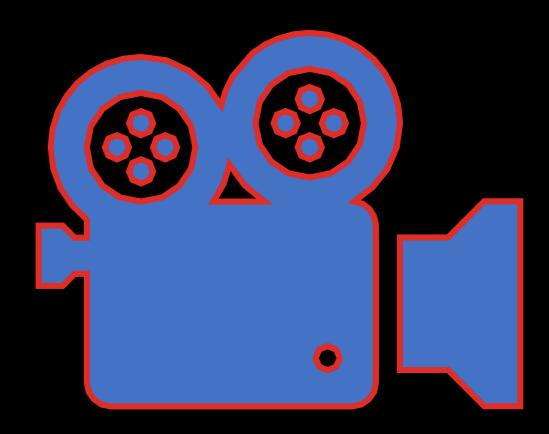
TASK 2 (P.89)

- Examine the following excerpt, what's the speaker's role and what's he trying to do?
- Good morning. If I could have everyone's attention, I think we are ready to start. Let me// just a note on format of this meeting too formal. It's gonna be just an open discussion about the items listed in the agenda, which I hope will take approximately half an hour.



TASK 2

 Watch a video clip of a meeting and fill in the gaps on your student booklet.





Chairperson: I'm sorry I have to call this meeting in short notice.

00:02:43-5 <u>Did you all get a copy of the latest sales figures?</u>

Members: Yes.

00:02:47-9

Chairperson: Good. So, you have seen from my memo that

00:02:49-7 there are two areas that <u>I'd like to look at here today</u>.

Firstly the reasons of this very poor results. And, secondly what

action we can take. Now, we need to spend time on this, but I

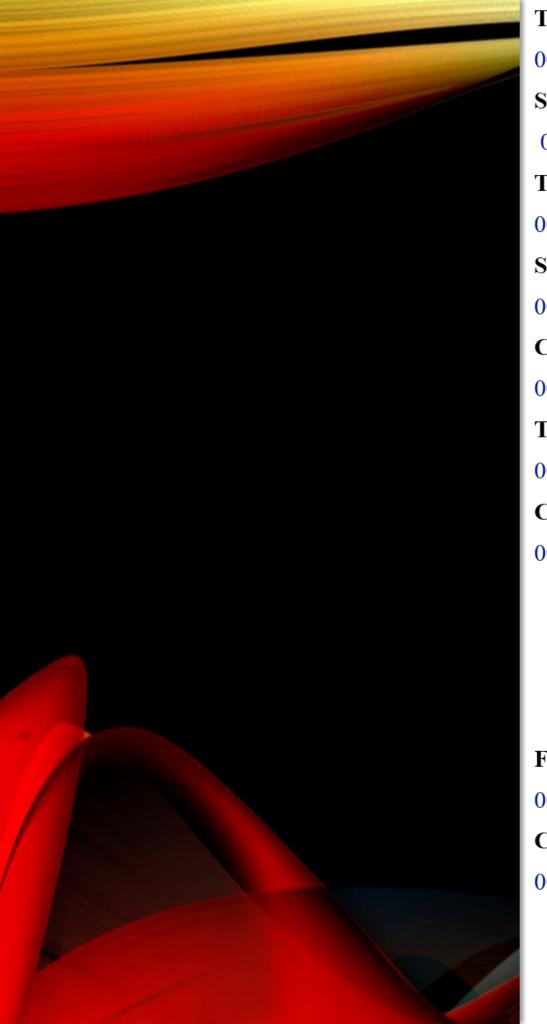
would like to aim for a 3 o'clock finish?

Members: (Nod.)

00:03:06-0

Adapted from Effective Meetings (Oxford University Press, 2005)





Tina: My flight was delayed by two hours this morning I felt I wasn't

00:06:11-0 going to make it.

Susan: So what time did you get here?

00:06:14-6

Tina: Oh, just after 9.

00:06:16-6

Susan: Oh, that was cutting it fine.

00:06:20-2

Chairperson: Tina <u>would you like a coffee</u> before we start?

00:06:20-2

Tina No, thanks. I'm fine.

00:06:22-1

Chairperson: Right, let's get down to business. I'd like to start by welcoming you

00:06:23-8 <u>all</u> to the head office for the first in a series of what <u>I hope will be</u>

very useful meetings.

I particularly would like to welcome Franco Novelli, our area

manager for Italy.

Franco, <u>have you already been introduced to</u> Tina and Susan?

Franco: Yes I have, thank you.

00:06:42-9

Chairperson: So, as you saw from my memo, the purpose of this meeting and

00:06:42-9 future meetings, is for us to exchange information on

our local markets. As we're all working in different regions,

it's important that we all share our experience.

Any comments about this objective?

ASSESSED TASK 4

ASSESSED TASK 4

- Engineering group (25%)
- Agenda (to be sent to client reps and instructor 3 days in advance)
- Quality of information prepared
- Participation
- Communication



GROUP (5%)

Group Submission: Video submission Total Score: 25 Weighting in Course: 5%

	Outstanding		Good		Satisfactory		Marginal		
•	Both the agenda and the	•	Both the agenda and the	•	Either the agenda or the	•	Either the agenda or the	•	Neithe
	blueprint are present.		blueprint are present.		blueprint is present.		blueprint is present.		bluepi
•	All agenda items are specific,	•	Most agenda items are	•	Some agenda items are	•	Most agenda items have no	•	Most a
	outcome-oriented and		specific, outcome-oriented		outcome-oriented and realistic		clear focus.		covere
	realistic.		and realistic.		despite some are not specific.	•	Some agenda items are not	•	The m
•	All items are effectively	•	Most/some items are	•	Though some of the items are		covered due to ineffective		at all.
	discussed and the meeting is		quite/fairly effectively		discussed, the meeting is not		time management.	•	Lack
	on the whole very productive.		discussed and the meeting is		quite productive.	•	The meeting is not		
•	Time is very well managed.		on the whole quite/fairly	•	Slightly runs out of time.		productive.		
•	Very collegial/supportive to		productive.	•	Some members are not	•	Most members are not		
	team members.	•	Time is generally well		enthusiastic.		enthusiastic.		
•	Demonstrates professionalism		managed.						
	and team spirit/effort.	•	Often demonstrates team						
	No. of the second secon	ų P	spirit/effort.		A CONTRACTOR OF THE CONTRACTOR	Y .			

ASSESSED TASK 4

- Individual (Engineers) (75%)
- Participation
- Etiquette
- Language



INDIVIDUAL (15%)

essment:	Individual Submissi	on: Video submission	Total Score:	Weighting in Cou	urse: 15%
ession	Outstanding	Good	Satisfactory	Marginal	Failed
&	 Impressive ability to participate in a wide range of sustained interactions Impressive and meaningful contributions to the negotiated outcomes of the meeting. 	 Ability to participate in some sustained interactions Quite/fairly meaningful contributions made to the outcomes of the meeting. 	Very few meaningful contributions made to the outcomes of the meeting.	Only one/two turns taken.	Very passive.
	 Very natural and spontaneous. Showing enthusiasm and involvement. No reading from a script or the blueprint at all. Very effective body language (where applicable). 	 Quite spontaneous with minimimal reading from a script or the blueprint. Showing some enthusiasm and involvement. Quiute effective body language (where applicable). 	 Quite frequent reading from the blueprint or a script. Showing limited enthusiasm and involvement. Rather little effective body language (where applicable). 	 Very frequent reading from the blueprint or a script. Showing very little enthusaism or involvement. Very little effective body language (where applicable). 	 Entirely pre-fab Very poor body (where applicab Showing no ent all.
trategies ng, turn- ding, d as of he main aging al to word groups,	 Use of a wide range of expressions and discussion strategies* to initiate and maintain interactions with others. Phonological features** are used effectively to convey and enhance meaning. Totally intelligible with no systemic errors in individual sounds/word and sentence stress/intonation. Speech is consistently coherent, sustained and spontaneous without lifted verbatim from the blueprint or the notes. Use of a wide range of grammatical forms and vocabulary with the flexibility to give and exchange views. 	 Use of a range of expressions and discussion strategies* to maintain interactions with others. Phonological features** are generally used to convey and enhance meaning. Generally intelligible with few systemic errors in individual sounds/word and sentence stress/intonation. Speech is generally coherent, sustained and spontaneous without lifted verbatim from the blueprint or the notes. Use of a range of simple and come complex grammatical forms and appropriate vocabulary to give and exchange views. 	 Use of a rather limited range of expressions and discussion strategies* to respond purposefully to others. Some control of phonological features** at sentence and word levels. Intelligible despite occasional errors. Speech is coherent but often slow and often lifted verbatim from the blueprint or the notes Use of simple grammatical forms and attempts some complex structures (despite some inaccuracies) and appropriate vocabulary to give and exchange views. 	 Use of very basic expressions and discussion strategies* to respond purposefully to others. Mostly intelligible despite limited control of phonological features** and L1 features. Speech is often hesitant and lifted verbatim from the blueprint or the notes. Only use of simple grammatical forms and basic vocabulary to convey very basic meaning. 	 Only one/two is used. Often unintellig communication due to L1 feature. Only use of ver grammatical for vocabulary of is and phrases.