Call and Organize an Effective Meeting

## 3 questions before the meeting

1. Do you really need a meeting?
2. Who needs to attend?
3. How much time do you need?

## How to organize

### State the meeting purpose (whether it is weekly/monthly appraisal, discussion, )

1. Venue and other logistic details (location, accessibility, comfort, time)

### Invite the right people (who needs to attend the meeting)

### Develop a preliminary agenda

1. Encourage attendees to prepare in advance (reminder, importance, motivation/breaking monotony with **Go-rounds, Small groups or pairs, Energisers, Ideastorms)**

### Assign roles to participants (facilitator, minute taker, expert)

### Start the meeting on time

### Keep track of meeting notes and next steps

### Send a meeting recap or follow up email

#### Sample meeting agenda

**7.00**Introductions and Check-in

**7.15** Report back from working groups: media, finance, stalls

**7.35** Meeting with Planning Officer: agree which issues to raise

**8.00 Break: tea and cake**

**8.20** Organising more stalls

**9.00**Evaluation and Close

## Formal Meetings

Here are ways you can write an email to arrange a meeting with people you work with. Follow this “plan” to write a simple, concise and clear email.

I’d like to arrange / organise / call a meeting…

… to discuss our strategy / plans  
… to clarify our policy on / our response to …  
… to prepare for the exhibition / conference  
… to finalise details / preparations for …  
… to establish guidelines / our procedure for …  
… to examine our financial position  
… to review our options / our spending / our budget / our policy on…

The meeting will be held at (place) on (day) at (time) / from (time) to (time).  
(Please find attached the agenda.)

Please confirm your attendance / Please confirm that you can attend.

I look forward to seeing you (all) then.

(your name)

## Informal Meetings

You can either email or phone or speak in person to arrange a more informal meeting. Here are some phrases you can use.

**In emails**  
Would you be free for a meeting on (day) at (time)?  
Can you make / attend a meeting on (day) at (time)?

I’d like to discuss / prepare / review…  
It’s about (subject).

I’ve prepared an agenda (attached).

Please confirm that this date suits you.

**Face-to-face**  
Would you be free for a meeting later today / after lunch / some time tomorrow about…?

We need to discuss / prepare / review / go over…

Shall we say at around (time) in the boardroom / my office?

## How To Arrange A Meeting With Clients

Here are some ways you can email a client to arrange a sales or presentation meeting.

**Salutation**

Dear (name)

**Introductory paragraph**

Following our meeting / phone call on (day), I’m writing to set up a meeting with you …

…to discuss a possible solution to (name of problem)  
…to discuss some ways in which our product / service can benefit you  
…to present our new (product) to you  
…to introduce you to (name of new colleague)

**Next 1 / 2 paragraphs**

Here, you’ll need to give some more detail about the meeting, your product or service, etc, and why it will benefit your potential client. Try to be as specific as possible and match your client’s needs to the product or service.

**Final paragraph**

Would you be free on (date) at around (time)? I estimate the meeting will take 15 / 30 minutes.

I look forward to hearing from you.

Yours sincerely / Best wishes

(your name)

## Useful Meeting And Discussion Phrasal Verbs

**to set up** a meeting = organise / arrange a meeting: “I’d like to set up a meeting to discuss the travel details.”

**to work out** = find a solution to something, or finalise something  
“We need to work out how our approach this negotiation.”  
“Can you work out a time that everyone can make?”

**to thrash out / to hammer out** = to discuss until you find a solution – often to a complex situation:  
“We’ll need to sit down and thrash out the details of the agreement.”  
“They hammered out an agreement after eight hours of talks.”

**to pin down** = to get someone to agree something – especially when this person doesn’t easily commit to things  
“You’ll need to pin him down for your starting salary.”

**to go over** = to discuss  
“Can we go over the arrangements for the launch?”

## How to write a meeting agenda

Whether you have a short, one-hour meeting or one that lasts a full day, you can use these steps to help you write an agenda:

1. Identify the meeting’s goals.
2. Ask participants for input.
3. List the questions you want to address.
4. Identify the purpose of each task.
5. Estimate the amount of time to spend on each topic.
6. Identify who leads each topic.
7. End each meeting with a review.

## Meeting agenda example

You can use the following sample meeting schedule when crafting your own agenda:

MEETING AGENDA

Date: Aug. 1, 2019  
Time: 1 p.m.  
Location: Conference Room A

AGENDA DETAILS

**\*Goals:** Review the marketing campaigns from last year, identify seasonal slumps in product demand, brainstorm ways to increase demand during these slumps and make sure we’re prepared for the next marketing campaign.\*

**1. Review marketing campaigns from last year.**

Time: 15 minutes  
Purpose: Share information  
Leader: Jamal Adams

a. Present the marketing campaigns from last year.  
b. Review the sales numbers after each campaign.  
c. Identify which campaigns seemed to have the biggest impact.

**2. How do we best manage the fluctuating demand for our product?**

Time: 30 minutes  
Purpose: Decision  
Leader: Blair Hanline

a. Review sales numbers from the last four quarters.  
b. Identify any trends in sales numbers.  
c. Brainstorm ideas on how to increase sales during those slumps.

**3. Preparing for the next marketing campaign**

Time: 15 minutes  
Purpose: Decision  
Leader: Blair Hanline

a. What do we need to prepare for the next marketing campaign?  
i. Review the attached marketing campaign materials.  
ii. Identify tasks for each team member.  
b. How will we track the effectiveness of this campaign?  
c. Review sales goals for this campaign.

**4. End of meeting review**

Time: 5 minutes  
Purpose: Decision

Leader: Jamal Adams  
a. What did we do well in this meeting?  
b. What should we do differently next meeting?









