Effective Meetings

Meetings are an essential activity in the product design and development process. Unfortunately, meetings are not always used and conducted effectively, leading to wasted time and where customers are involved, a reduced confidence in the design team. Meetings that are well organised with all participants adhering to a few basic guidelines can realise a great deal of productivity in a relatively short period of time.

Introduction

Meetings are tools for accomplishing work. The work to be done can include decision making, information gathering or problem solving. Meetings are also excellent venues for recognition or celebrations. A poor use of meetings is dissemination of information or regular reports that are better suited to other means of communication.

A successful meeting begins with good preparation. This increases the likelihood that team members will attend and actively participate, and leave feeling that something valuable was accomplished. Timely follow-up after a meeting ensures the work accomplished in the meeting is not lost.

It is useful for teams to use their first meeting to establish some practices and guidelines that will be used at subsequent meetings.

Guidelines for Conducting Effective Meetings

Meeting Preparation

- **Decide on the purpose of the meeting**. The purpose of the meeting should be what the team expects to *accomplish* during the meeting. In other words, the meeting should have a measurable outcome. If the purpose is not measurable, evaluate alternatives other than a meeting to satisfy this type of purpose.

- **Prepare and distribute an agenda.** If an agenda wasn't created at the previous meeting, poll the team members for agenda items to be submitted at least two days prior to the meeting. If action items are to be completed for the meeting, ask the persons responsible if they will be prepared to report on the action items. Agenda items should be accompanied by the time that should be allotted to address the specific agenda item. (See Attachment A for a sample agenda). For meetings longer than two hours, include a 10-minutes break in the agenda. Distribute the agenda well enough in advance so attendees have time to prepare and be ready to contribute. As a precaution, make hardcopies of the agenda to bring to the meeting. Someone inevitably always forgets to bring his or her agenda.
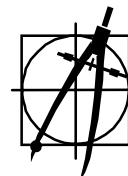
- **Determine who needs to be at the meeting**. If all of the participants are not required for most of the agenda items, consider having multiple meetings to make use of peoples' time more effectively. It is better to have a few people attend multiple meetings than to have a number of people sit through agenda items in which they have little interest.

- **Determine the required length of the meeting**. It is common to set meeting lengths to an hour or multiples of an hour and participants will often "fill" the entire length of the meeting. If a meeting only requires 20 minutes or 75 minutes, then set the meeting to that length. Make sure the agenda indicates both a starting and ending time for the meeting.

- **Find a location and time for the meeting.** For some teams, it is useful to set a regular time and place to meet that satisfies everyone's' schedule, then cancel the meeting if there is not a need to get together. When schedules are tight, sometimes working lunches are the easiest way to get together.

The First Meeting

It is useful to use the first meeting to determine and agree upon policies for meeting conduct. These policies provide a reference that the facilitator can use to intervene. These policies should be established to include:

- **Tardiness**. One of the biggest meeting time waters is due to people showing up late resulting in the meeting getting off to a late start or having to "catch people up" who have entered after the meeting has started. Some teams find it useful to have a penalty for latecomers. One example is to have anyone who is late pay a nominal sum of money that, when accumulated, will be used to buy the team lunch.

- **Air Time**. Sometimes there are people on a team that like to always have the floor resulting in some team members getting the chance to be heard. Decide upon policies that will allow everyone "air time".

- **Interruptions**. Most people do not like to be interrupted so likely everyone will agree that interruptions will not be tolerated.

- **You versus I**. The team should make it a policy that the contexts of comments made are about the project and not the people involved in the project. Personal attacks can elevate the meeting to a volatile level.
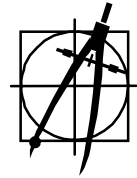
- **Chairperson and Facilitator**[*]. It should be decided if the chairperson and facilitator roles are given to specific individuals or if they are rotating roles. The chairperson leads the team through the business as presented by the agenda – in other words, deals with the content of the meeting. The chairperson is often the leader of the current phase of the project. The facilitator deals with the process of the meeting and is responsible for ensuring all participants adhere to the policies set by the team.

- **Minutes**. Determine who will take minutes (specific person or rotating role), and the expected turn-around time and method for dissemination of these minutes.

- **Off-Sides**. Meetings can very easily be derailed when conversations take a tangent. These are sometimes known as "off-sides". The team should agree upon how these deviations should be handled – make record of them to be addressed if there is time at the end of the meeting, add them to the agenda or the next meeting, or address them in a separate meeting.
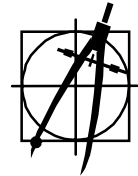
The Meeting

The chairperson of the meeting should show up a few minutes early and make sure the meeting place is equipped with everything necessary for the meeting (e.g., chairs, flip charts, markers, overhead, etc.)

Each meeting should begin with the following activities:

- **Attendance**. A record of participants and those absent ("regrets") are recorded in the meeting minutes. Consider making a notation of late comers. If there is anyone at the meeting who is not familiar with everyone else, quick introductions are in order.

- **Review minutes of previous meeting**. Meeting participants should come to the meeting having read the minutes of the previous meeting. Only items that there is disagreement on whether they have been accurately recorded are to be briefly discussed and updated.

- **Review of the Agenda**. This is the point additional agenda items should be put forward. These items should be included only if they are relevant to the meeting and there is time available, or if the team agrees they should take precedence over another agenda item that can be deferred.

---

[*] It is strongly recommended that everyone have a chance to experience each of the different roles at some point during the design project.

- **Statement of purpose and objectives**. The chairperson should review the purpose of the meeting and the expected outcomes. If necessary, a reminder of meeting policies can be made at this point.
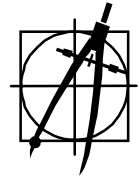
During the meeting:

- **Stick to the agenda**. Stay on the topic of the agenda item and be compliant with the allotted time.

- **Take notes**. One person should be responsible for keeping meeting minutes. These minutes should not detail entire conversations but should record decisions as well as any action items (What needs to be done? Who is responsible? When is it to be done?). Individuals should maintain their own record of actions assigned to them in their logbooks.

- **Defer items that cannot be effectively addressed**. If it is found during the course of a meeting that an item cannot be addressed because of lack of information or the right individuals are not present, don't waste time on that item. Instead, defer the agenda item to a meeting when it can be adequately addressed. Make sure an action item is in place to prevent the same item from being deferred repeatedly.

Concluding the meeting:

- **Set the agenda for the next meeting**. In the agenda, include the purpose and objectives of the meeting as well as a time to meet. Any unfinished or unaddressed business from the current meeting should be noted.

- **Evaluate the meeting**. Briefly discuss if the meeting addressed the intended purpose and objectives, and if not, why.

- **End on time**!

After the meeting:

- **Consolidate and distribute the minutes**. The minutes of the meeting should be distributed to the team members within a day of the meeting.

- **Thank guests**. If any guests attended the meeting, such as a customer, accompany a copy of the meeting minutes with a brief note of thanks.

References

Gause, Donald C. and Weinberg, Gerald M., *Exploring Requirements: Quality Before Design*, Dorset House Publishing, New York, NY, 1989. pp.80-91

The Memory Jogger: A Pocket Guide for Continuous Improvement and Effective Planning, GAOL/QPC, Methuen, MA, 1994. pp. 154-155

Attachment A

Generic Meeting Agenda

Date & Start/End Times:

Location:

People Attending:

Materials/Information to Bring:

Purpose:

Objectives:

Time Allotted	Agenda Item
8 min	**Introductory Business**
2 min	Introductions
3 min	Review of minutes from previous meeting
2 min	Review of agenda
1 min	Review meeting purpose & objectives/anticipated outcomes
3 min	**Announcements**
7 min	**Project Status Report (project progress, schedule, budget)**
22 min	**Meeting Topics**
5 min ⋮ ⋮	Name of Topic 1 (Lead: Joe Smith) ⋮ ⋮
8 min	Name of Topic n (Lead: Susan Tran)
10 min	**Arisings**
5 min	**Preparation for next meeting**
4 min	Prepare agenda
1 min	Agree upon time and place
5 min	**Evaluation of meeting, review of action items & adjournment**