

# Introduction to Business Meetings

Week 5, Unit 5

CC11 Communication in the Workplace

Bretz Harllynnne M. Moltio



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# Business Meetings in the Modern World

What is a business meeting? | Common types of business meetings |  
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# What is a Business Meeting?

- Gathering of professionals
  - Members from the same team
  - Members from the same company
  - Members of the same level (managerial, top management, etc.)
  - Company members and partner companies
- Discuss business-related matters
  - Voting of business-related matters
  - Conflict resolution
  - Provide announcements and address changes
  - Celebrate success



# Common Types of Business Meetings

- Planning
- Innovation
- Information sharing
- Status update
- Decision-making
- Problem-solving
- Team building



# Common Types of Business Meetings

## ***Planning***

- Creation of proposals for new guidelines, practices, and events
- Can just be for one item or multiple items done within a period of time

## ***Innovation***

- Improvement of existing business processes through new and/or unorthodox practices, equipment, and guidelines
- Done usually by higher-ranking company members



# Common Types of Business Meetings

## ***Information Sharing***

- Providing information to a huge number of participants to which the information is necessary
- Done for changes in business practices, company-wide events, or announcements on new partnerships

## ***Status Update***

- Periodic meeting where participants report changes in their tasks
- Members are expected to give feedback to the status



# Common Types of Business Meetings

## ***Decision Making***

- Composed of a small number of participants to decide matters that will be beneficial to the company
- Can be done in the course of a few meetings

## ***Problem Solving***

- Brainstorming and finalization of ideas to certain problems or issues found in the company
- Can be done before a decision making meeting





# Common Types of Business Meetings

## ***Team Building***

- Gain better understanding and create relationships with team members
- Examples: corporate events, team outings



# Business Meeting Platforms

## ***Considerations:***

Time and place

- Urgency
- Number of participants
- Type of business meeting
- Environment / atmosphere
- Level of engagement / participation

## ***Types:***

- In-person
- Virtual



# Business Meeting Platforms

## ***In-Person***

- Can be also referred to as face-to-face
- Members meet each other to conduct meetings
- Allows for more nonverbal communication to surface
- Types:
  - Formal meeting
  - Informal meeting
  - Visitation
  - Dinner / lunch meeting



# Business Meeting Platforms

## ***Virtual***

- Requires the use of video conferencing tools to conduct
- Members meet at the same time in different places
- Good if meetings are urgent and/or only requires divulging information
- Common video conferencing tools:
  - Zoom
  - Google Meet
  - Microsoft Teams
  - Skype



# Best Practices in Conducting Business Meetings

Preparation | Conduct | Aftermath



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# Preparation for Business Meetings

- Identify the cause of a meeting
- Set appropriate time and date
- Detail meeting agenda
- Notify participants
- Prepare materials



# Preparation for Business Meetings

## ***Identify the Cause of a Meeting***

- What is the meeting for? (general idea and main points)
- What are the deliverables of the meeting?
- Do we need a meeting?
- How long will the meeting be?
- Who will be participating?
- What is the platform to be used? (in-person / virtual)



# Preparation for Business Meetings

## ***Set Appropriate Time and Date***

- Is it urgent?
  - If yes, then must be set immediately using virtual means
  - If not, then identify other factors
- Who will be participating?
  - Take note of the schedules of the bosses / higher ranking attendants of the meeting
  - Check meeting schedules of other relevant team members
- Set date, time, and location of the meeting





# Preparation for Business Meetings

## ***Detail Meeting Agenda***

- Agenda – items that need to be considered or done
- Questions to be asked:
  - What are the things that need to be talked about?
  - What should the team decide during this meeting?
  - What are the specific deliverables?
  - What are the deadlines included in the meeting?
- Create a short list of events that will happen during the meeting



# Preparation for Business Meetings

## ***Notify Participants***

- Best to use email for notifying participants
- Let them know a few days (if not urgent) before
- Include the following:
  - Time and date
  - Location (in-person) or meeting link (virtual)
  - General agenda
  - Reminders before and during the meeting (if needed)
- Allow participants to either confirm or decline an offer



# Preparation for Business Meetings

## ***Prepare Materials***

- Create materials needed for the meeting
  - Slideshow presentation (status updates)
  - Video presentation (status updates)
  - Note cards (informal presentations)
  - Shareable file (virtual collaboration)
- Materials depend on the nature of the meeting
- Assign someone to either record or create the minutes of the meeting



# Conduct of Business Meetings

- Greetings and introductions
- Review of agenda
- Present necessary presentations
- Field participant questions and answers



# Conduct of Business Meetings

## ***Greetings and Introductions***

- Check if everyone is on the meeting
- Assign a note taker other than yourself
- Set the feel of the meeting
  - Start with a prayer and / or national / company anthems
  - Establish rapport (if possible)
  - Introduce rules (if needed)
- Introduction of yourself and specific people to other members in the meeting



# Conduct of Business Meetings

## ***Review of Agenda***

- If the meeting is done periodically:
  - Periodically i.e. weekly, monthly, quarterly, etc.
  - Go over the things discussed during the last meeting
  - Ask everyone if they want to quickly go over previous topics
- Go over the projected structure of the business meetings
  - Ask the team if they want to add more related topics (if possible)



# Conduct of Business Meetings

## ***Present Necessary Presentations***

- Provide context to everyone about the meeting
- Showcase presentations:
  - Presentations for status updates are longer
  - Presentations for every other type of meeting must be short
- Be concise in providing information
- Create a call to action if applicable





# Conduct of Business Meetings

## ***Field Participant Questions and Answers***

- Be open to answer any questions after every presentation
  - Provide a neutral or positive tone in answering questions
  - If possible, go back to the presentation related to the answer
- For activities during the meeting:
  - Be open for any questions
  - Provide context and assistance as much as possible
  - Present outputs if possible





# Aftermath of Business Meetings

- Thank participants for coming and engaging
- End with a call to action
  - Remind deadline
  - For periodic meetings, remind the next schedule
  - Ask note taker to summarize, type, and send minutes
- Follow up
  - Allow participants to ask questions after the meeting
  - Use email to document questions
  - Possible to bring up these questions the next meeting





# Minutes of the Meeting

What is a minutes of a meeting? | Parts of a minutes of a meeting |  
Tips in creating the minutes of the meeting



# What is a Minutes of a Meeting?

- Official business document that summarizes salient points that have transpired in the meeting
- Includes:
  - Key issues that are discussed
  - Motions proposed and/or voted on
  - Activities that need to be undertaken
- Taken by a designated member of the group
  - The person presiding the meeting is not the same person taking note of the meeting
  - Usually of the same position / of lower rank than the presider



# What is a Minutes of a Meeting?

- Used to document actions that has transpired in the meeting, in order to:
  - Refer to decisions made during the meeting
  - Refer to during periodical meeting
  - Check progress of team members
  - Validate tasks being done by team members



# Parts of a Minutes of a Meeting

- Template and content of the minutes are dependent on the following:
  - Organizational / company format
  - Nature of the meeting
  - Amount of points / information in the minutes



# Parts of a Minutes of a Meeting

## ***Meeting Information***

- Provides all of the main information regarding the meeting
- Includes the following:
  - Name of the meeting
  - Date and time
  - Location / video conferencing tool
  - Agenda / objectives
  - Time of adjournment



# Parts of a Minutes of a Meeting

## **Attendees**

- Lists all attendees who were part of the meeting
- Small number of attendees: part of the minutes
- Bigger number of attendees: separate attendance sheet
- Includes the following:
  - Presider
  - Minutes taker
  - Guests
  - Attendees
  - Non-attendees



# Parts of a Minutes of a Meeting

## ***Agenda***

- Lists down the main topics that is tackled in the meeting
- Usually provided by the presider beforehand
  - If not, then it is written down after summarizing the minutes
  - Agenda can be modified during the meeting





# Parts of a Minutes of a Meeting

## ***Minutes – Topic***

- Sort the minutes according to the key points / topics /agenda



# Parts of a Minutes of a Meeting

## ***Minutes – Descriptions***

- Give context to what the topic / agenda is
- Can include:
  - Presentation of topics
  - Status reports of members of the team
  - Contextualizing the team building, innovation, or planning meetings
- Include who was saying the descriptions
- Must be short at around 1-3 sentences



# Parts of a Minutes of a Meeting

## ***Minutes – Descriptions***

| Type of Meeting  | Person Talking   | Sample Statement  |
|--|--|---|
| Planning /<br>Innovation /<br>Decision Making /<br>Problem Solving | Presider   | The presider states that the management wants the team to draft a proposal for a competition for the 75th founding celebration. |
| Information<br>Sharing   | University President<br>(ex. President<br>Nancy M. Flores) | PNMF presents the modified WFH schedule for February 1 – 15, 2022   |
| Status Report  | Team member<br>(ex. Lovely Jenn<br>Reformado)              | Ms. Reformado shares that the partnership with Company A is ongoing, with the MOA sent to their HR director.                    |



# Parts of a Minutes of a Meeting

## ***Minutes – Descriptions***

- Tips on constructing the descriptions:
  - It should only contextualize the agenda
  - Using acronyms is okay to make it shorter, but ensure that the attendees are aware of them
  - Do not add too many acronyms, especially if the term is not commonly used / seen throughout the minutes



# Parts of a Minutes of a Meeting

## ***Minutes – Call to Action***

- Includes the items that needs to be addressed / done during the meeting
- Can include:
  - Voting results
  - Assigned persons / offices
  - Deadline
  - Required deliverables
- Not included in information sharing meetings



# Tips in Creating a Minutes of a Meeting

- Be aware of the template of the meeting
- Take note in different ways (if possible, create written notes and a recording of the meeting)
- Add only the salient points and add those ones on the minutes
- Make sure that the content is brief yet clear
- Sending in minutes to presider for approval
- Provide members of the meeting a copy of the minutes



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