



EFFECTIVE IT MEETINGS

PARTICIPANT GUIDE

TABLE OF CONTENTS

OUTCOMES	3
THE ART OF BAD MEETINGS	3
TO MEET OR NOT TO MEET – PTA REVIEW	4
FOUR STEPS OF AN EFFECTIVE MEETING.....	4
PLAN AND PREPARE.....	4
PLANNING YOUR MEETING.....	5
WHO TO INVITE.....	5
SCHEDULING YOUR MEETING	6
PREPARING AN AGENDA.....	6
PREPARE AN AGENDA ACTIVITY	7
CONDUCTING EFFECTIVE MEETINGS	8
MEETING BEST PRACTICES.....	8
EFFECTIVE IT MEETING ROLE-PLAY ACTIVITY.....	9

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EFFECTIVE IT MEETINGS

OVERVIEW

There is a lot that goes into ensuring a meeting is efficient. As an IT team member, you will be expected to lead many meetings, some of which may be with high-level stakeholders. If your meetings are not run effectively, participation may drop and you may leave the meeting without getting the information or outcome needed.

Use this Participant Guide to follow along with the facilitator to complete activities and take notes during the in-class portion of this training.

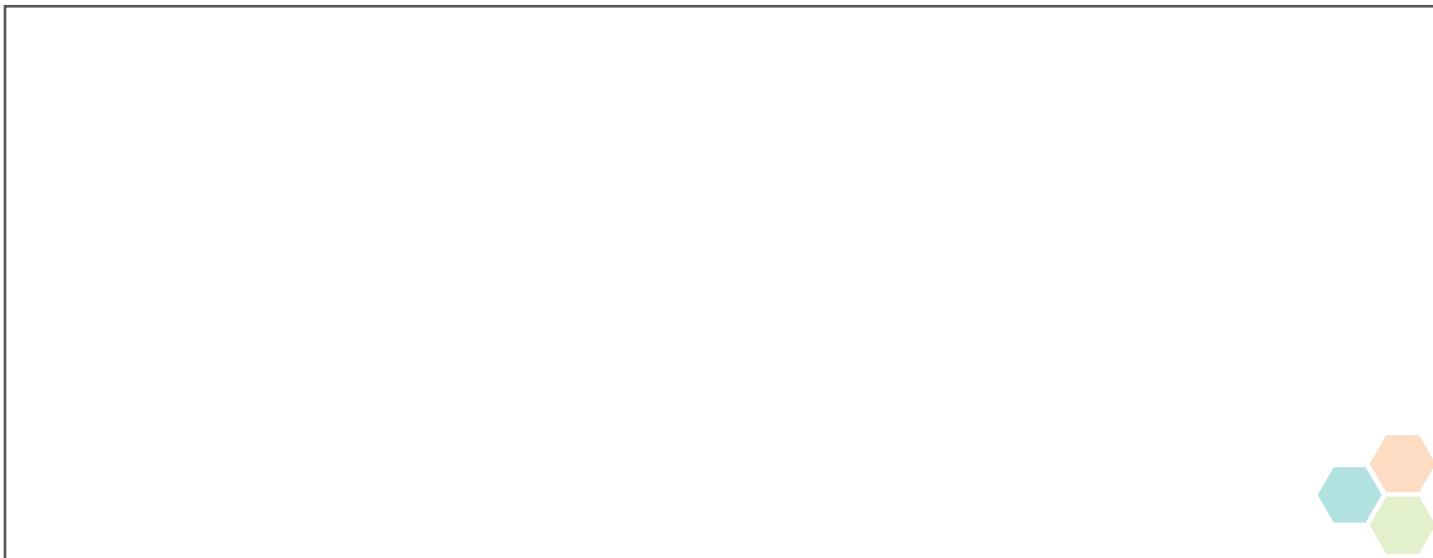
OUTCOMES

At the end of this training, you will be able to:

- Create an agenda and schedule a meeting in Outlook
- Demonstrate best practices for conducting an effective meeting in a role-play scenario

THE ART OF BAD MEETINGS

Ineffective meetings are just that – ineffective. They can be unproductive, drawn out, and leave everyone feeling like they could've made better use of their time doing something else. As you watch the video played during training, use the space provided to take notes on things you notice during the video.



TO MEET OR NOT TO MEET – PTA REVIEW

Before even starting the agenda and scheduling our meeting, one of the things we can sometimes forget to consider is whether a meeting is even needed at all. In your pre-training assignment, you learned about the various forms of communication we have at our disposal and the factors that help us determine whether a meeting should be held. Use this time to follow along in class as your facilitator reviews the answers to the “To Meet or Not to Meet” activity from your Pre-Training Assignment.

FOUR STEPS OF AN EFFECTIVE MEETING

When it comes to running effective meetings, you can break the elements into four basic steps. Use the space provided to take notes on the four steps covered by your facilitator.

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NOTES

PLAN AND PREPARE

All four steps are critical to an effective meeting but proper planning and preparation is key! A lot can go into planning and preparing for meetings. Follow along with your facilitator as they cover how you can plan and prepare to have an effective meeting.



PLANNING YOUR MEETING

Once you've determined that a meeting needs to be scheduled, you can start planning and preparing to set yourself and your meeting participants up for success. Use the space provided to take notes on things to consider when planning to have an effective IT meeting.

WHO TO INVITE

One of the first questions you should ask yourself when planning a meeting is "Who should be invited?". When we talk about IT meetings as a whole, when considering who to invite, it's important to invite the team members who are involved with the project we're meeting about. In IT, you can group team members into three buckets for meetings, use the space below to take notes on each.

Business Team Members	
Technical Team Members	
Support Team Members	

What can you do to ensure you're including the right people in your meeting invite?



SCHEDULING YOUR MEETING

Once you've determined who should be invited to your meeting, it's important to think about when and where a meeting should be held. The length of your meeting depends on your subject matter, but as a general rule of thumb it's best to keep meetings under 1 hour. Attention spans are limited, the longer a meeting runs, the higher the likelihood of getting off track or losing focus.

SCHEDULING RESOURCES

- Outlook
- Scheduling Assistant
- Robin Room Finder
- Campus Map

NOTES

PREPARING AN AGENDA

Preparing an agenda can help ensure everyone is on the same page regarding what will be discussed in the upcoming meeting. Use the space provided to take notes on what should be included in your agenda.

Some of the most important things to include in an agenda are:

- Meeting Purpose
- Meeting Goal
- Agenda Items/Topics
- Pre-meeting action items

If you're ever unsure of what to include in an agenda, the UWM meeting agenda template can be found in [Uzone](#).

Agenda Example #1

Project Kick-off Meeting

Purpose: Collaborate with the business to discuss the new project request

Goal: Introduce the team and confirm project details

Agenda Items:

- Welcome and introductions
- Project overview
- Project scope
- Key milestones and deadlines
- Questions
- Next steps

Agenda Example #2

Project Kick-off Meeting

Purpose: Project kick-off

Goal: Kick-off the newest project

Agenda Items:

- Intros
- Project discussion
- Questions

PREPARE AN AGENDA ACTIVITY

Review the scenarios below and use the space provided to create an agenda with a goal, meeting purpose, agenda topics, and any pre-meeting action items for each.

Scenario 1

Morgan's team has received a new work request. She wants to schedule a kick off meeting to get an overview of the project. Since this is the first meeting, they will need to cover project team member introductions, a summary of the request, and a question and answer session. Summary of the request should cover what the team wants to accomplish, current state of the process/system, and project deadlines.

Scenario 2

Tyler is scheduling a whiteboarding session with his team. The whiteboarding session will be used to brainstorming ideas. Tyler plans to set ground rules for the session, allow time for questions, and vote on solutions with the team. Tyler would like everyone to review the project overview document prior to attending the meeting.

IN YOUR OWN WORDS

How does proper planning and preparation impact meeting effectiveness?



CONDUCTING EFFECTIVE MEETINGS

By conducting effective meetings, IT team members can demonstrate strong communication skills, encourage collaboration, and accomplish project goals in an efficient manner. Follow along with your facilitator as they cover the final 2 steps to effective meetings – conduct and follow-up.

MEETING BEST PRACTICES

There are many different best practices that can help you conduct an effective IT meeting. During this training, we will cover 6 different best practices. Use the space provided to take notes as your facilitator covers each best practice.

Set Expectations	
Create & Assign Roles	
Time Management	
Manage Conflict	
Conclude Meeting	
Send Recap	

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EFFECTIVE IT MEETING ROLE-PLAY ACTIVITY

Use this time to complete the effective meeting role-play activity. In groups, as you take turns conducting each meeting feel free to use the space provided to take notes on any best practices observed or feedback received.

NOTES

THE ART OF EFFECTIVE MEETINGS

What takeaways from this training could be used to make the meeting from the opener more effective?

If you have any questions or concerns,
please reach out to IT TRAINING at ITTRAINING@UWM.COM.

