



## EFFECTIVE IT MEETINGS

### **PRE-TRAINING ASSIGNMENT**

\*\* INTERNAL USE ONLY \*\*

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# EFFECTIVE IT MEETINGS PARTICIPANT GUIDE

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## 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 as you complete your Pre-Training Assignment (PTA) and bring it with you to class.

## PRE-TRAINING ASSIGNMENT EXPECTATIONS

Because your time for classroom training is limited, it is important to spend the majority of your time practicing skills and completing activities that strengthen your comprehension of the concepts. To ensure we provide you with the hands-on time you need, the amount of lecture time you will receive will be minimal. However, we need to make sure you have the knowledge and basic comprehension of the terms and theories behind the practices. This pre-training assignment will provide you with the knowledge and terminology you need to effectively practice the skills required for the in-person portion of this course.

By providing you with "homework" before you attend the in-person training, we are giving you the opportunity to build a foundation of knowledge before coming to class to apply it. This allows you to formulate your own thoughts and ideas on the subject as well as draft any questions you would like answered.

**Please make sure to follow all directions provided in your assignment and complete all parts BEFORE your in-person session. If you have any questions about your assignment, please reach out to your assigned trainer.**

## OUTCOME

At the end of this training, you should be able to determine whether or not a meeting is necessary in 4 different scenarios.

## COMMON COMMUNICATION METHODS

At UWM, there are many different ways we can communicate with one another. Many of which you may already be familiar with. Before you consider scheduling a meeting, take into account the other ways that might help you communicate in the most efficient and effective manner. Use the space below to take notes on the five different communication methods covered in your PTA.

<b>Impromptu Chat</b>	
<b>Video/Phone Call</b>	
<b>Teams Message</b>	
<b>Email</b>	
<b>Meeting</b>	

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## NOTES

## WHEN A MEETING SHOULD BE CALLED

There are multiple things to consider when deciding if a meeting is necessary. Use the space below to take notes on the three factors covered in your PTA.

Number of Individuals Impacted	Level of Urgency	Topic Complexity

## ACTIVITY: TO MEET, OR NOT TO MEET

Read through each scenario in your Pre-Training Assignment and determine if a meeting is necessary. If you find that a meeting is not necessary, write down the communication method that would work best. Use the space below to write your answers.

**NOTE:** This activity must be completed before attending the in-person portion of this training.

### SCENARIO 1

Monica is having a conversation with Stacey about deploying user story 12345. Monica thinks that everything is done and the story is ready to be deployed, but Stacey believes there may be additional work to complete the story. The PO is pushing to get this story deployed in the next 24 hours. Stacey would like to ask others on the team to decide if it can be deployed. Quite a few members on the team have other meetings this week, so the earliest time that works for everyone won't be until the next day.

Should this be a meeting?

If not, what method of communication may be best to try first? Why?

## SCENARIO 2

Jake is conducting research for a new user story and needs more detail. He'd like to understand the requirements better by discussing it with his product owner. He thinks his developer and quality engineer should also be involved in case they have questions.

Should this be a meeting?

If not, what method of communication may be best to try first? Why?

## SCENARIO 3

Dave would like to schedule a meeting with his team members to inform them of new seating assignments when they return to the office.

Should this be a meeting?

If not, what method of communication may be best to try first? Why?

#### SCENARIO 4

Natasha wants to set up a meeting to demo enhancements to DocHub. This is a high-visibility project that will impact all of operations, and she wants to make sure everyone involved thoroughly understands the changes to the application.

Should this be a meeting?

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If not, what method of communication may be best to try first? Why?

**If you have any questions or concerns,  
please reach out to IT Training Team at [ITTraining@uwm.com](mailto:ITTraining@uwm.com)**