



Introduction

Welcome to the Chairing a Meeting with Confidence course. You are on your first project and must organise and manage the project kick-off meeting. What do you do first? Do you create the agenda or the invitation list? How do you run a meeting? What preparation do you need?

All these are valid and real questions you must address as the meeting manager. There is no doubt about it, meetings require skill and technique in order for the meeting to achieve its purpose. Disorganised and poorly managed meetings waste time and hurt your credibility as a meeting manager. If left unchecked, consistently leaving a poor impression on the attendees will haunt you.

Click on the first lesson below—or the “*Start eLearning*” button above—when you’re ready to begin.



Running an Effective Meeting



Introduction: Completed

Running an Effective Meeting



An Effective Meeting—An Illusion or Just Elusive?

Ever been in a meeting that never ends? Or one that makes you wonder why you're even there? Most of us are well-acquainted with meetings that feel like a waste of time.

Meetings serve important functions, however. We use them to exchange information, get team input on ideas, brainstorm new ideas, and solve problems. If our meetings are ineffective, it's hard to achieve these goals.

In this lesson, you'll learn the five steps to running meetings that are more efficient, more constructive, and more engaging for you and your team.



Should We Have a Meeting?

A meeting is only as effective as it is necessary. So before calling a meeting, ask yourself: *“Is a meeting the best way to achieve my goal?”* Or, *“Is there another medium of communication or collaboration that would produce the same results?”* Review the following checklist for guidance:

- Could I communicate my message effectively through a short email or message?
- Is this something I can handle on my own?
- Can I/we solve this problem without a meeting?
- Can we collaborate effectively without a meeting?

Is the purpose of the meeting a low priority or otherwise not urgent?

Is it possible to collaborate on this project asynchronously—and produce the same results?



If you checked any of the boxes above, then you may not need to meet. Unnecessary meetings waste time and resources—and exasperate attendees. Explore alternative ways to communicate your message or collaborate on a project.

How to Run an Effective Meeting

However, if all of those boxes remain unchecked, a meeting may be the best way to move forward. So the next question is: How do you run an effective meeting? Click through the following cards to learn five steps.

Step 1

Define Your Objective

You decide to call a meeting for a reason—not just to gather your colleagues for idle chit-chat. You need to discuss a particular issue, idea, or project. You have an objective you hope to achieve. Whatever the “why” might be, if you’re going to run an effective meeting, you need to know it.

Here is a list of common reasons why you might want to call a meeting:

- Share knowledge or provide training.
- Brainstorm and develop new ideas.
- Align team members.
- Make decisions.
- Solve problems.
- Solicit feedback.
- Give direction.
- Boost morale or foster team-building.

If you don’t see your specific reason on this list, that doesn’t mean you shouldn’t hold your meeting. The key is to understand the purpose of your meeting before you plan it. So, ask yourself, *“What do I want to accomplish by the end of this meeting?”*

Step 2

Invite Attendees and Choose Your Location

The next step is to choose who should attend the meeting and where it should take place.

1. Attendees. Use your meeting objectives to decide who to invite. No meeting invitation should be arbitrary or gratuitous. Ask yourself:

- Whose perspective would be helpful?
- Who needs to know the information you'll cover?
- Who is involved with, or affected by, the project?
- How should attendees prepare for the meeting?

2. Location. The location of your meeting also matters. Consider this:

- How long do you expect this meeting to last? Host lengthy meetings in a comfortable setting. Or, to keep a meeting short and create a sense of urgency, you might ask attendees to stand (as they are able).
- Do you need a whiteboard or other visual resources? Access to certain materials may determine where you hold the meeting.
- What kind of environment do you want to create? You might consider holding a brainstorming meeting in a creative environment, for example.

Step 3

Set an Agenda

A meeting agenda communicates a meeting's details, objectives, and discussion topics. A deliberate, well-thought-out agenda will help keep a meeting focused and moving forward. It includes the following elements:

- The time, date, and location of the meeting
- Who will be attending
- The meeting objective
- Topics to be discussed
- Meeting activities or action items
- Allocated time for each portion of the meeting

Tip: Create and distribute the agenda in advance to give attendees time to prepare their thoughts and ideas.

Step 4

Facilitate Discussion and Stay on Track

During a meeting, you're responsible for facilitating the discussion and staying on track. Prompt attendees with discussion questions and encourage equal participation. You can also keep the meeting on track by:

- **Moving forward.** Encourage action and don't let the conversation waffle. Be direct and press for clarity about final decisions, task delegations, and deadlines.
- **Avoiding detours.** Don't hesitate to note when the discussion is veering out of lines for the meeting's objectives. Be direct and let others know you can discuss off-topic items offline or in another meeting. Then, redirect the conversation.

Tip: Ban distractions. Keep your meeting space focused and distraction-free by banning cellphones, nonessential laptops, and other distractions during the meeting.

Step 5

Summarize Meeting Outcomes

Finally, summarize outcomes at the end of each meeting agenda item—including at the end of the meeting. Meeting outcomes include decisions made, tasks delegated or roles assigned, and key information exchanged, as well as due dates. Clarifying and repeating meeting outcomes ensures that everyone has a common understanding of key takeaways and next steps.

Tip: Assign a notetaker. Consider assigning the role of notetaker to one attendee. Have that person take notes of ideas suggested, topics discussed, and outcomes. After the meeting is over, you can send these notes in a recap email to all attendees for their reference.

Summary

Meetings often take up a lot of time in our workdays. Don't let that time go to waste. A little preparation can help. Setting a clear objective and developing a meeting agenda will help you stay focused on what you want to achieve. Attendees will appreciate only receiving invites to the meetings that are truly relevant to them. Facilitating meetings that are focused and actionable will keep everyone moving forward. And summarizing meeting outcomes will keep your team aligned while avoiding confusion or miscommunication later.



Keep track of time. One of the biggest meeting challenges is ending on time. Navigate this challenge effectively by keeping a clock, stopwatch, or another form of countdown visible.



To check your understanding of the lesson content, answer the question below...

You're facilitating a meeting to decide whether to buy new project management software. You begin by discussing the limitations of your current software. However, this spurs a side discussion about the challenges the team is facing on a particular project. What do you do?



Discuss the challenging project. Encourage everyone to participate in brainstorming solutions. Press for actionable suggestions.



Shift gears to focus on these pressing project challenges.



Acknowledge that the project challenges are important and should be discussed. Suggest scheduling a separate meeting for just those involved in the project.

SUBMIT



Close this window to continue to Module 1

Introduction: Completed



Congratulations, you have successfully completed this module!
You may now close this window and progress to the next module.