



Module 1: Prepare for a Meeting I

The first step in making your meeting effective begins with your planning and preparation activity. Determining the purpose of your meeting, who should attend, and the location will form the foundation on which you will build your agenda, decide what materials you need, and identify the roles each attendee will have in the meeting. Sufficient planning and preparation will help reduce any stress you may experience from managing a meeting.

This module is part one of your planning session, which focuses on essential factors that could affect the success of your meeting: the **people**, **place**, and **purpose** of the meeting.



Identifying the Participants



Choosing the Time and the Place



Create a Meeting Checklist



Setting a Meeting Agenda



Purpose of Recording a Meeting



Knowledge Check



Module 1: Completed

Identifying the Participants



Use your meeting objectives to decide who to invite.

Determining who attends the meeting is an important first step in preparation. Your tendency to include all employees in an effort to cover all angles could alter the meeting dynamics. Before you decide who to invite, be specific about the purpose of the meeting. For example, if you are meeting to resolve a problem, invite only those who are capable of providing solutions to that problem. Avoid inviting a high-ranking manager who could thwart solutions before they are developed.

On the other hand, if the purpose of the meeting is to make a decision on a policy or product, do not invite people who do not have the power to enact those changes. Including people who cannot contribute to the meeting will leave them feeling excluded which may affect the meeting environment. Identifying the purpose of your meeting first will help to determine who should attend.

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?

Who should attend my meeting?

Choose the right people to join the meeting and keep the number of attendees low to improve collaborative conditions.

Watch this video clip on how to identify meeting participants and invite them.



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

The optimum number of people to invite to a meeting is _____ or less.

Type your answer here

SUBMIT



Complete the content above before moving on.

Choosing the Time and the Place



There are several considerations when planning the time and place of your meeting.

For instance, the time of day is essential if your meeting is meant to be a brainstorming session or problem-solving meeting. Setting these types of meetings right after lunch or late in the day could be a frustrating experience. After lunch people tend to be lethargic, and meetings at the end of the day are plagued with participants looking at the clock in anticipation of leaving work and going home.



Meetings that require energy and a high level of participation are best scheduled between 8 and 9 in the morning. Most workers are not engaged in their daily work yet so you will have their attention and energy at the meeting. The next best time is around 3 PM. This gives your participants enough time to recuperate from their lunchtime meal and offers at least an hour of cushion before they start thinking about going home. Meetings that are low key could be scheduled anytime during the day. Just remember not to schedule them too close to lunch or near the end of the workday.



The location of your meeting also matters. Try to schedule your meeting in a well-lit, spacious room. If possible, get a room with windows. Dark and cramped rooms will bog down your meeting, as some people may feel claustrophobic and distracted by their surroundings. Other considerations are the need for privacy if the meeting topic is of a sensitive nature, having a room with more privacy will make participants more comfortable. And if you plan to have an outside visitor attend your meeting, situate your meeting near the main entrance. This way your visitor does not have to search for the meeting.

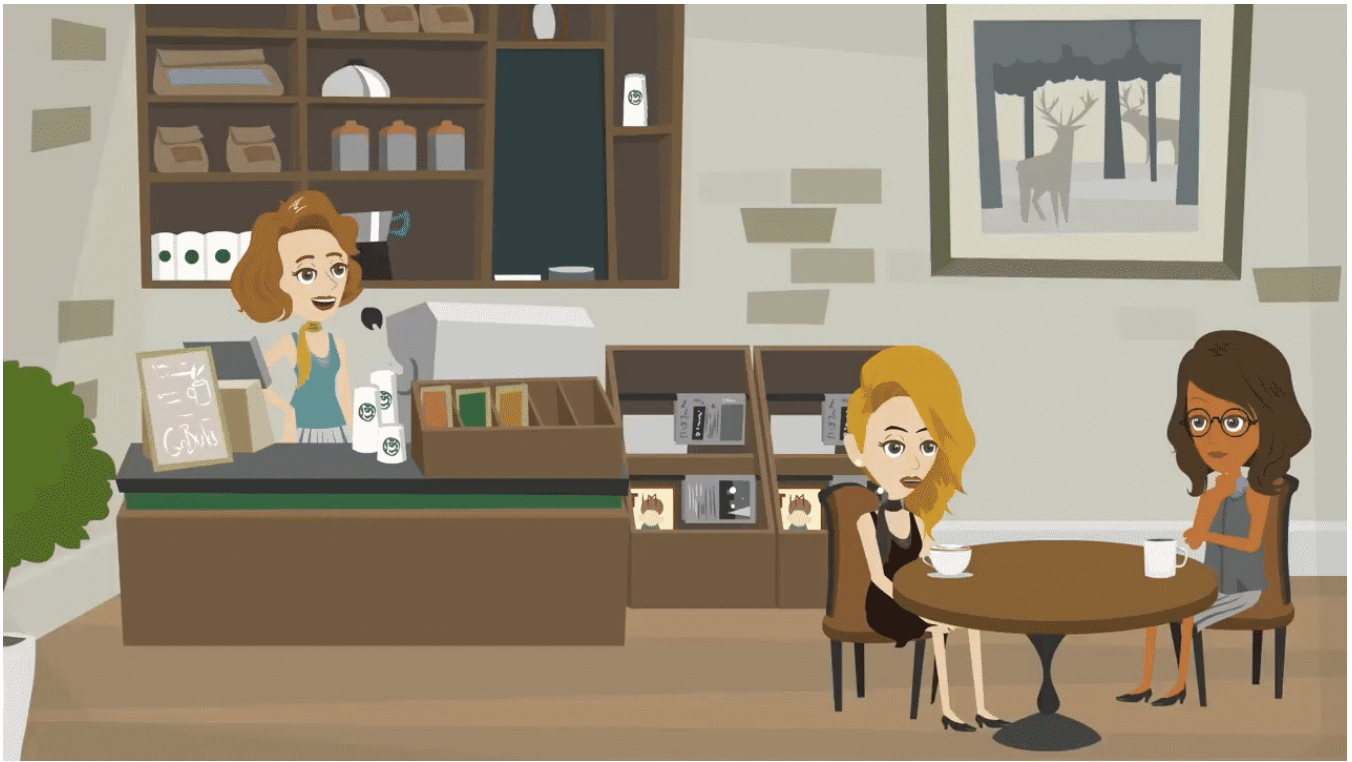
Consider this:

- 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.



Watch this video clip to reinforce what we've learnt in this lesson...



Complete the content above before moving on.

Create a Meeting Checklist



Your Role as Meeting Facilitator

As a meeting facilitator, your role is to establish a meeting's objective and lead the group toward achieving that goal. You'll guide the group by organising the agenda, facilitating conversation, and summarising the next steps or key outcomes.



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Core Responsibilities Checklist

Here are your core responsibilities as a meeting facilitator. Refer to this checklist before your next meeting:

- Define the meeting objectives.
- Translate those objectives into a planned agenda.
- Choose and arrange a meeting time and location.
- Confirm that the right people will attend.
- Assign relevant pre-work so that everyone is prepared.
- Manage the clock for pacing and punctuality.
- Keep the discussion on-topic.
- Encourage full participation from all attendees.
- Communicate the meeting results and next steps.

CONTINUE TO NEXT LESSON

Setting a Meeting Agenda



What's an Agenda?

An agenda is a list of activities and discussion items that attendees hope to complete during a meeting. An agenda serves as a compass for your meeting; it provides direction and tells you if a meeting has gone off track.

Setting an agenda for your meetings creates many benefits. Some of those benefits include:

- 1** **Clarity.** An agenda clearly details what topics a meeting will cover and in what order. It also defines your meeting objectives.
- 2** **Focus.** An agenda keeps attendees focused by providing structure for the meeting. Discussion is less likely to take a detour when there is a clear road map.
- 3** **Alignment.** Finally, an agenda helps to get alignment and ensures that attendees arrive at the meeting with the right expectations. It gives participants a framework for discussion and the opportunity to prepare relevant thoughts for contribution.

Setting an agenda is an important step toward making your meetings more productive. In this lesson, you'll learn how to develop an effective agenda that will give your team clarity, focus, and alignment.

Watch this video clip...



How to Develop an Agenda

Five main sections comprise a meeting agenda. Expand each tab below to learn how to develop that section.

1. Start With the Logistics —

Start with **basic details of the meeting** that answer questions about who, where, and when. This includes:

- The date, time, and location of the meeting
- Meeting duration
- Meeting facilitator
- Meeting attendees
- Any materials attendees should bring to the meeting

Tip: Try to limit the number of meeting attendees you invite. You should only invite those people who are needed to accomplish your meeting objectives or who are affected by the project.

2. State the Objective —

Your **objective** is the result or outcome you hope to achieve by the end of this meeting. It may be a decision that needs to be made, a problem that needs to be solved, a plan that needs to be developed, or another deliverable. Don't confuse a meeting topic with the meeting's objective. The objective is your meeting's purpose, and it determines how a meeting is defined as a success.

3. Review Housekeeping Items —

Housekeeping items describe any introductory items that need to be covered or reviewed before getting into the main talking points of the meeting. These items might include a summary of results from a previous meeting, introductions, project overviews, or even ground rules for the meeting's discussion.

4. Outline Meeting Topics & Activities —

Meeting topics or activities make up the core of an agenda. Topics are subjects to be discussed. Activities are action items; for example, you might want the group to watch a video, complete an exercise, or review a handout. Consider the following tips when adding topics and activities to an agenda:

- **Make it relevant.** Make sure that topics are relevant to the meeting's attendees and objectives.
- **Seek input.** You aren't expected to know everything that a meeting should cover. Especially for larger and more complex projects, don't hesitate to ask attendees for input on agenda topics. By seeking input in advance, you avoid unexpected discussion items and can better predict how long the meeting will take.
- **List topics as questions.** List topics as questions where possible and relevant to encourage decision-making.
- **Add time estimates.** Estimate how long each topic or activity will take so that you and attendees can monitor progress and stay on track with the allotted meeting time.

Depending on the duration of the meeting, you might also consider including breaks in the agenda. Again, this will help you account for every minute of the meeting and avoid going over time.

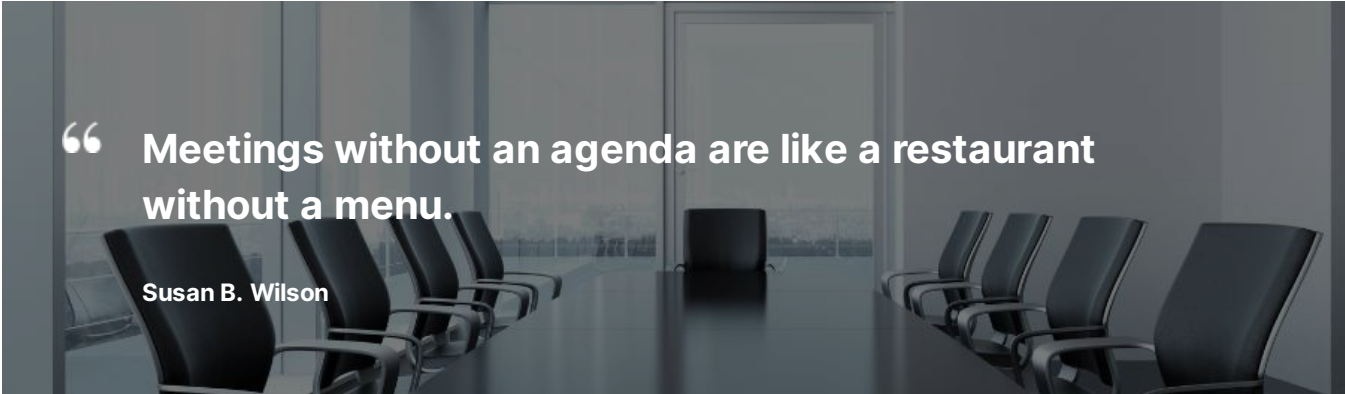
5. Attach Supporting Materials —

This last section is optional. Consider if the meeting requires attendees to review in advance any **supporting materials** such as reports, project briefs, case studies, or financial documents. Attach any supporting materials to your agenda that your attendees might need, so they can adequately discuss a topic or conduct a meeting activity.

Distribute the Agenda in Advance

Aim to circulate the agenda at least 24 hours in advance of the meeting. Distributing the agenda in advance gives attendees time to make adequate preparations. Your

meeting will be more effective and efficient if attendees can reflect ahead of time on their thoughts, ideas, or questions regarding specific meeting topics.



“ Meetings without an agenda are like a restaurant without a menu.

Susan B. Wilson

A Sample Meeting Agenda

Review the simple example of a meeting agenda below. Try to identify the meeting logistics, objective, housekeeping items, topics and activities, and supporting materials to recap what you've learned about developing a meeting agenda.

Social Media Internship Meeting

18 July 20xx

13:00 - 14:30 (SAST)

Location: The Think Tank

Meeting Facilitator: *Jess Atherton*

Meeting Attendees: *Caleb Olsen, Jake Crawford, and Maya Anderson*

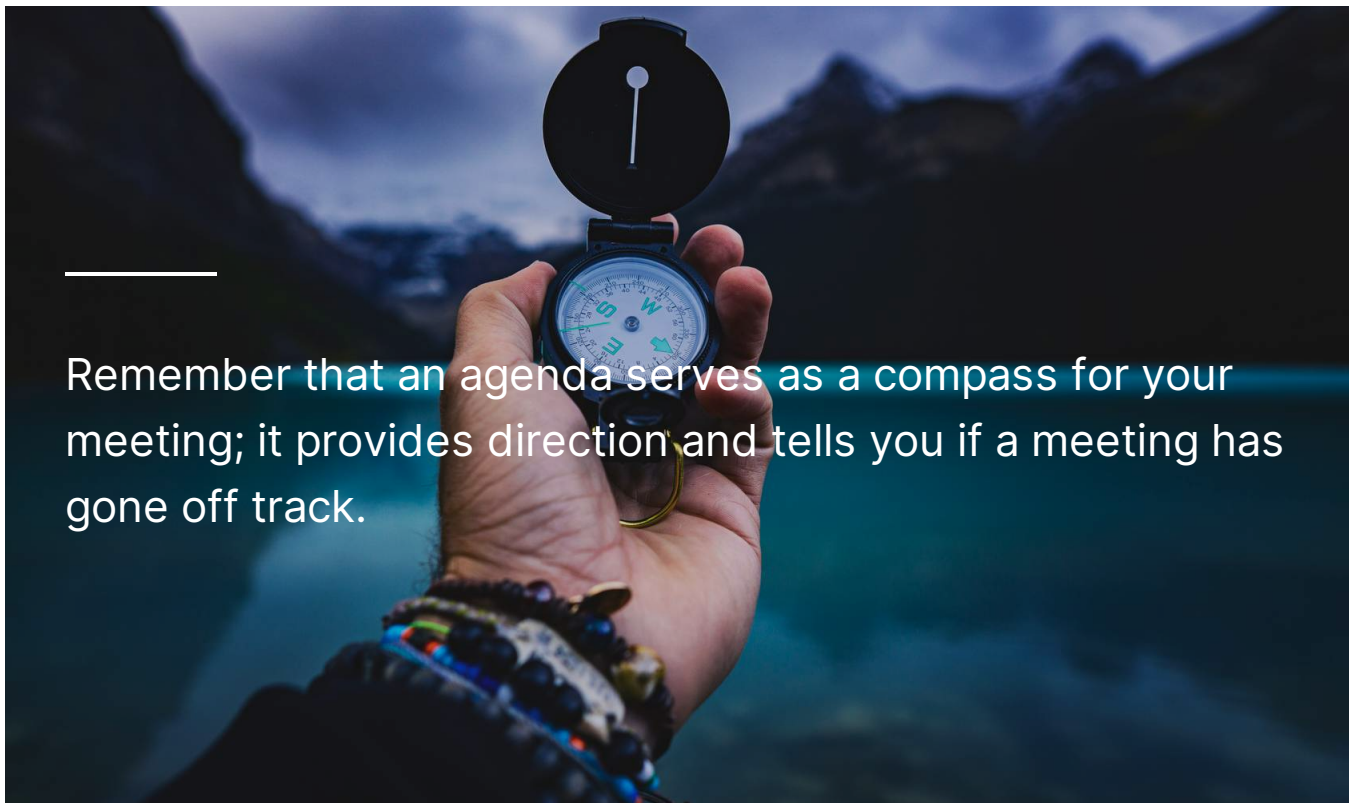
Objective: *To define what kind of content (what) is ideal to post to which social media channels (where) and how often (when).*

- *Review target audience and brand voice (Jess) (10 minutes)*
- *What does our audience care about? (20 minutes)*

- *Team brainstorm: motivations and pain points (10 minutes)*
- *Present different kinds of social media channels (Caleb) (10 minutes)*
- *Define what type of content is ideal for what channel (20 minutes)*
- *Determine frequency of posting (10 minutes)*
- *Assign social media roles and responsibilities (Jess) (10 minutes)*

**Please review the attached brand guidelines before our meeting.*

Remember that an agenda serves as a compass for your meeting; it provides direction and tells you if a meeting has gone off track.



A Final Checklist

Use this final checklist to make sure you haven't forgotten anything on your next meeting agenda.



List the logistics. The agenda lists the time, duration, and location of the meeting, as well as the names of the meeting facilitator and attendees.



Define the objective. The agenda clearly states the purpose of the meeting.



Review housekeeping items. The agenda includes all necessary housekeeping or introductory items.



Outline meeting topics and activities. The agenda provides a comprehensive outline of meeting topics and activities.



Attach supporting materials (optional). The agenda provides all necessary supporting materials as a separate attachment.

Summary

Meetings fill a considerable amount of time in our workdays. It doesn't matter if it's a status update meeting, a board meeting, a post-mortem meeting, or a creative meeting—an agenda is an asset to all meetings. An agenda is not a long or complicated document, and it doesn't require much time to create. Set a meeting agenda and circulate it well in advance to achieve greater clarity, focus, and alignment in your meetings.



Use a template. Agendas are typically designed as a list or outline and are ideally limited to a single page. However, it may be longer depending on the length and complexity of the meeting. You can save yourself time when developing future meeting agendas by designing a template to use again.



Test your skills in setting a meeting agenda with this exercise.

Review the example of an agenda below and then answer the multiple-choice question that follows to determine what's missing.

Sample Agenda —

Art in the Park Event Meeting

Date: 01 April 20xx

Time: 10:00 - 12:00 (SAST)

Location: Olympic Building, Conference Room 2

Meeting Facilitator: Alex Ramirez

Meeting Attendees: Calvin Avery, Makena Gilbert, Ashleigh Walter, and Brandon Rowe

1. Recap last meeting's minutes. (5 minutes) (Alex)
2. Review overall vision for the event. (5 minutes) (Makena)
3. Approve vendor list. (10 minutes) (Makena) [attached]
4. Discuss event marketing and develop marketing strategy. (60 minutes)
5. Assign marketing roles and deadlines. (10 minutes)
6. Receive information on space planning, discuss next steps. (30 minutes) (Calvin)

What's missing from the sample agenda above?

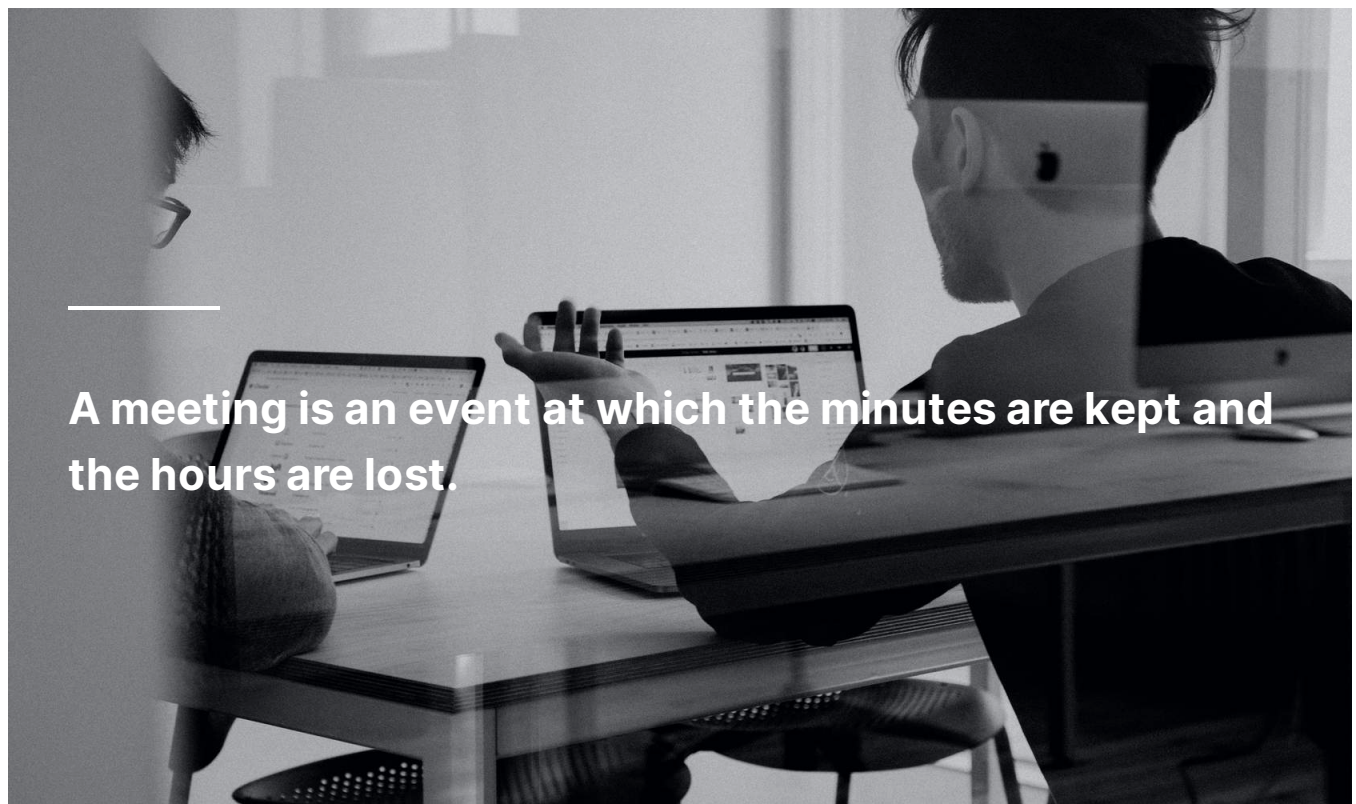
- Meeting Logistics
- Housekeeping Items
- The Meeting's Objective
- Meeting Topics
- Meeting Activities

SUBMIT



Complete the content above before moving on.

Purpose of Recording a Meeting



A meeting is an event at which the minutes are kept and the hours are lost.

It is standard procedure in most workplaces to record everything of importance that transpires in a meeting. Methods of record-keeping may vary, but the most common method is having a secretary take notes. These notes, or minutes, are usually circulated in draft form so that all participants have the opportunity to check for accuracy and to make corrections if necessary. This ensures that all participants agree that the record is accurate.

In South Africa where resources are stretched in a tight economy, not all leaders have the privilege of having a secretary. For that reason, it is important that the meeting chairperson or organiser either record the meeting themselves or appoint someone to the task.

Taking minutes is a skilled job because the minute taker has to follow what can be confusing and inarticulate debates and summarise accurately what was said.

Minutes are required to:

- 1 Confirm decisions made
- 2 Record agreed actions to be taken
- 3 Assign responsibilities for agreed actions
- 4 Prompt action from relevant attendees
- 5 Provide details of the meeting to anyone unable to attend
- 6 Serve as a record of the meeting's procedure and outcome

After the meeting, the minutes should be checked with the chairperson to confirm the accuracy and then circulated to all attendees and anyone else affected by any decisions taken at the meeting.



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

Who should check the meeting minutes for accuracy?

Type your answer here

SUBMIT



Complete the content above before moving on.

Lesson 6 of 7

Knowledge Check



Module 1: Review Questions

Question

01/05

Who should you invite to meetings?

- High-ranking managers
- All the interested employees
- People compatible with the meeting's purpose
- Everybody, in order to explore all the options

Question

02/05

Which of the following is an occasion for a meeting?

- Brainstorming
- Project initiation
- Planning
- All of the above

Question

03/05

Meetings that require energy and a high level of participation are best scheduled:

- Between 8 and 9 am
- Between 10 – 12 pm
- Between noon and 2 pm
- After lunch

Question

04/05

Which of the following is an important factor when it comes to the place of the meeting?

- Light
- Size
- Windows
- All of the above

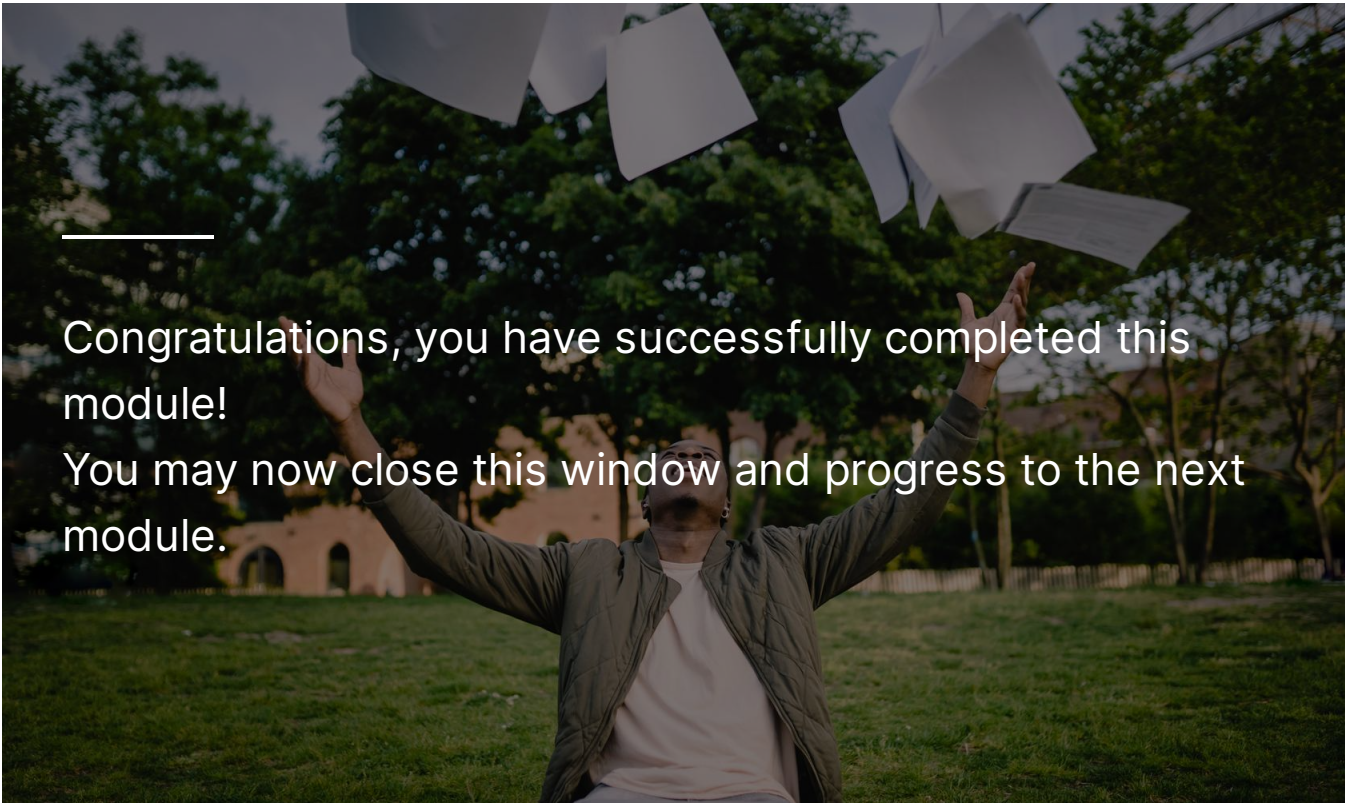
Question

05/05

What are the 3 Ps of the planning session?

- Paper, prosper, patience
- People, place, purpose
- Present, place, purpose
- Purpose, people, patience

Module 1: Completed



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