

Module 2: Prepare for a Meeting II

The last module dealt with the participant planning aspect of your meeting. In this module, you will learn how to gather the things you need to help facilitate the meeting more effectively. In addition, you will learn how to structure your invitation so you can communicate your meeting in a way that is consistent and sets expectations. Finally, you will understand the importance of making the logistical arrangements in advance, avoiding any last-minute mishaps.



Gathering Materials



Scheduling Meetings



Documents Required for a Meeting are Checked for Accuracy



Making Logistical Arrangements



Knowledge Check



Module 2: Completed

Gathering Materials



Each meeting you hold will require both basic and special materials. Your job as the meeting manager is to determine what materials you will need and acquire them in advance, avoiding last-minute surprises. The **SHOWS** acronym stands for **S**tationary, **H**andouts, **O**rganizer, **W**riting tools, and **S**pecial requests.

Let us break down each letter so you get a better understanding of what this means.

Stationary

This is all the equipment you will need at the meeting, including notepads, sticky notes, index cards, envelopes, tape, paper clips, folders and flip charts. Each meeting is different. You do not need to bring everything on this list. Determine what is going to take place at the

Handouts

Many times, you or your presenters will need to distribute handouts. There could be a handout or an outline from an electronic presentation. In any case, you should consult with your presenters and acquire any handouts they plan to use.

Determine if the handout

Organizer

When it is time to meet, the last thing you want to do is show up with a stack of handouts. Using an organizer like a portable accordion file or Pendaflex is an easy way to file your handouts and other stationary materials in one container. This system will

Writing Tools

This includes pens, markers, highlighters, and dry erase markers you may need for your meeting.

Special Requests

From time to time, your presenters may make a special request. An example could be a poster. Ask your presenters ahead of time for any special requests.

CONTINUE TO NEXT LESSON

Scheduling Meetings



Meeting Madness

Scheduling meetings takes a surprising amount of administrative work. You have to talk to attendees, compare availability, and find a time that works for everyone. Scheduling conflicts, mistakes, or last-minute changes can lead to several rounds of back-and-forth emails. And every time you reschedule a meeting, the process starts over again.

In short, there's an art to efficient scheduling. With the right hacks, you can reduce the time spent on these administrative tasks.

6 Scheduling Hacks

Expand the rows below to learn six best practices for scheduling meetings efficiently and effectively:

Obtain Key Stakeholders' Commitment —

First, obtain key stakeholders' or executives' commitment to meet before scheduling with other meeting participants. You don't want to send out an invite—only to have to reschedule later. Or worse, host a meeting where key players don't show up.

Schedule During Natural Transition Times —

Natural transition times are periods throughout the day when you or meeting attendees are most likely to be wrapping up a task, taking a break, or between tasks. This includes:

- First thing in the morning
- Immediately before or after lunch
- End of the workday
- Back-to-back with another meeting

Scheduling meetings during these times helps to minimize **task switching**, which is the mental energy, effort, and time it takes to stop one task and start another (like attending a meeting).

Keep Meetings Short —

Most meetings can be completed in 30 minutes or less. Avoid scheduling lengthy meetings arbitrarily. Instead, make the default meeting length 15-30 minutes. Meetings tend to fill the time you allot for them.

Use Scheduling Tools

Consider using scheduling tools to cross-check availability across multiple meeting participants' schedules. For example, if you're scheduling a meeting internally, you might request access to view coworkers' schedules on Google Calendar—or use Doodle to poll attendees' availability. Or, if you're scheduling a meeting with a client, you might explore tools such as Calendly.

There are many scheduling tools to choose from. Leverage these tools to minimize back-and-forth messages or emails and automate the process of sending calendar invites.

Send a Calendar Invite and Write a Description

Send a calendar invite to meeting attendees once you've found a time that works. It's also helpful to include a description so that attendees know what the meeting is about, what to expect, and how to prepare. Incorporate the meeting agenda or assign any relevant pre-work to complete before arriving at the meeting.

Start and Stop on Time

Finally, schedule a start and stop time—and stick to it. Start the meeting on time—even if an attendee is running late—and end it when promised.

The meeting invitation email is one of the most important items on your event prep to-do list. It gets

your meeting onto people's agendas and keeps it there, even with other demands on their time.

Right-click the link below and choose **Open Link in New Window**, to read an article on how to write an effective meeting invitation email:

[How to write effective meeting invitation emails](#)

READ TIME: 9 MINUTES

What Time Works for You?

And here's a final tip: If you don't have a scheduling tool, then don't ask attendees, *"What time works for you?"* This question creates unnecessary back-and-forth emails because it's too vague and open-ended. Instead, narrow the options. Give meeting attendees a few specific dates and times to choose from. For example, you might say, *"Here is the team's availability. Please let me know which date and time works best for you."*

So much of running an effective meeting revolves around setting clear objectives and keeping a meeting on track.



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

Scheduling meetings during these times helps to minimize ____ _____, which is the mental energy, effort, and time it takes to stop one task and start another (like attending a meeting).

Type your answer here

SUBMIT



Complete the content above before moving on.

Documents Required for a Meeting are Checked for Accuracy



The purpose of the meeting and the level of formality of the meeting dictates, to a point, what documentation is required. That being said, there are four documents common to most meetings as follows:

- 1 Notice of a meeting
- 2 Agenda of a meeting
- 3 Minutes of a meeting
- 4 Form of Proxy

All meeting documentation should be checked with the chairperson to confirm the accuracy.

We have reached the end of this lesson. Please download the document below that practically illustrates what we have learnt...



Sample Meeting Notice, Agenda and Minutes.pdf

222 KB



Complete the content above before moving on.

Making Logistical Arrangements



There are several areas to consider when planning the logistics:

Physical Space —

Consider the space in which you plan to hold your meeting.

- Is it on site or off site?
- Do you need to make reservations?
- Does it need to be set up?
- Do you have to contact your facilities department to remove or add partitions?
- Do you need furniture moved?



Travel —

Identify who will need to travel to your meeting.

- Do they need travel arrangements?
- Do they need transportation to and from the meeting location?
- Do you have to make security aware of their presence so they are not held up at the door?

Making It Real —

Determine if you need to organize meals.

- Is your meeting starting early in the morning; will you need to serve a light breakfast?
- Is your meeting all day?
- Will you have it catered?
- Are you planning to have lunch at a local restaurant?

- Do you need to make reservations?

Audio and Visual —

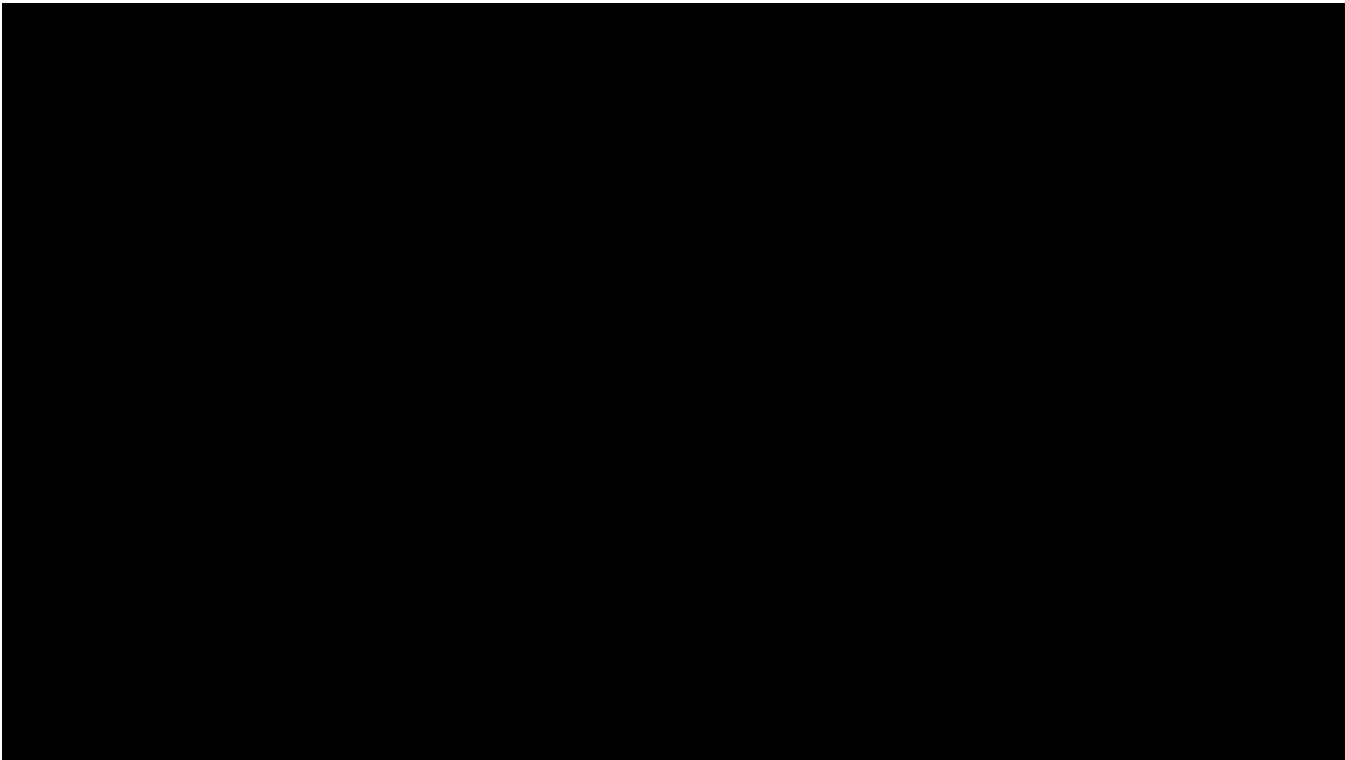
If you plan to use electronics, consider the following:

- Do you have to get this placed in the meeting room?
- Are you savvy enough in troubleshooting technical problems or do you need a technical assistant?
- Do you need a projector, screen, computer, etc.?
- Do you need a sound system set up so everyone can hear the presenters?

Signage —

- Do you need to get signs, posters, special handouts made up for your meeting?

Watch the video clip below...



Complete the content above before moving on.

Lesson 5 of 6

Knowledge Check



MODULE 2: REVIEW QUESTIONS

Question

01/06

What does the W in SHOWS technique stand for?

- Writing technique
- Writing tools
- Writing programs
- Writing invitations

Question

02/06

What does the S in the SHOWS technique stand for? Select all that apply.

- Stationary
- Sticky Notes
- Security Papers
- Special Requests

Question

03/06

In an invitation the subject line has to be:

- Attractive
- Declamatory
- Specific
- High-flown

Question

04/06

Which of the following is not something you have to think about when it comes to physical space of the meeting?

- Reservations
- Moving furniture
- Is it on-site or off-site
- Plants and decorations

Question

05/06

Which of the following will you need to consider before the meeting?

- Food
- Signage
- Audio and visual
- All of the above

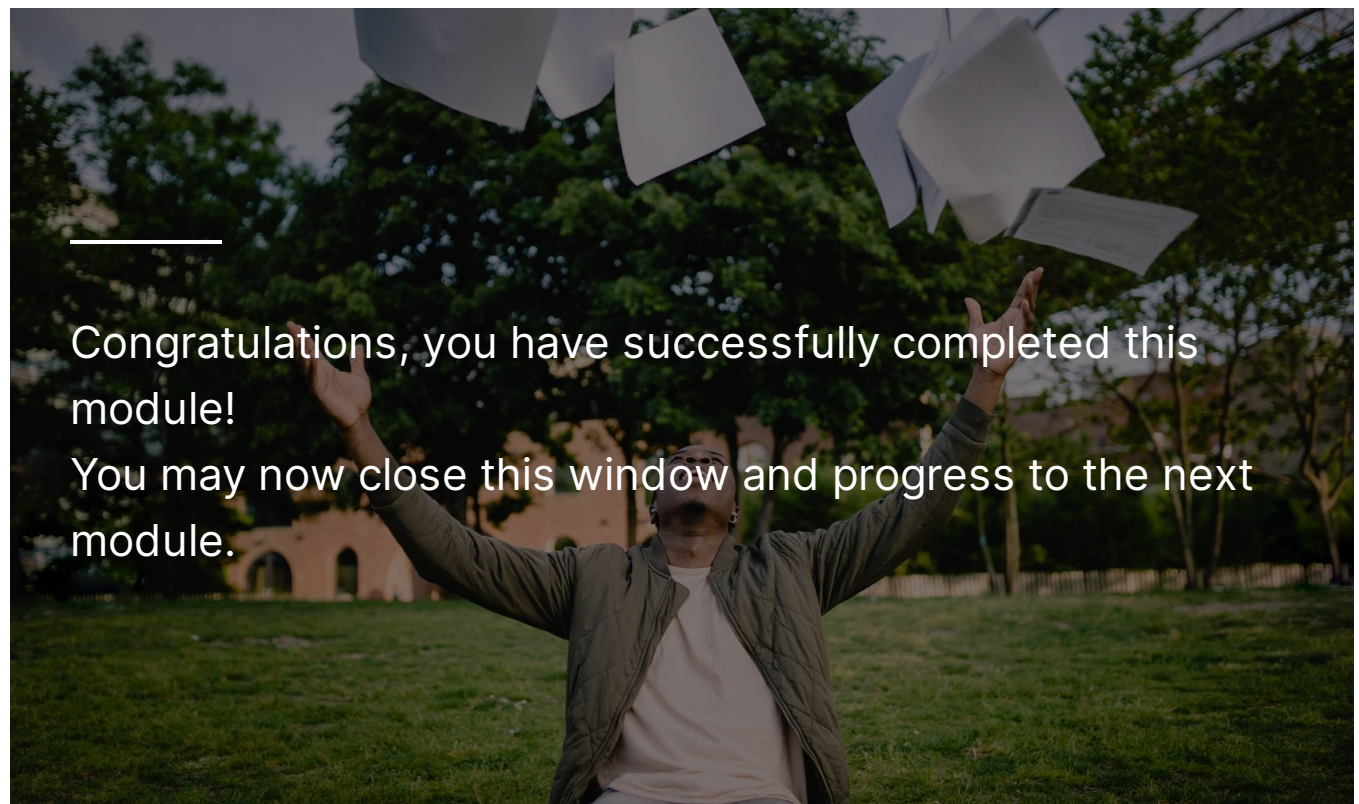
Question

06/06

Using an organizer like a portable accordion file or Pendaflex, is an easy way to:

- Store your posters
- Store any prizes
- File your handouts and other stationary materials
- Keep your lunch

Module 2: Completed



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