How to Plan, Organize, Hold, Moderate & Facilitate More Effective meetings

Presented by:
Daniel Feiman, MBA, CMC®, Visiting Professor
Activity - Ice breaker

1 word
• 2 groups
• 1 minute
• 1 word
Today’s agenda

- Ice breaker
- Self-introductions
- Ground rules
- Activity – review generic meeting agenda
- Expectations
- Activity – assessment
- Do you *need* a meeting?
- Is a meeting the best way?
- How to prepare for a meeting
- Facilitator
- Participants
- Pre-Work
- Roles
- Structure
- Location
- Agenda
- Summarize
- Meeting checklist
- Follow up
- What have you learned today?
Ground rules

• Participate
• Mobile phones to silent or vibrate
• Text, SMS protocol?
• 1 person talks at a time
• Stay on topic
• ELMO
Generic agenda

Meeting Agenda
Date / Time: Wednesday, August 10, 2011 from 2:00 – 8:00 PM
Location: XYZ Co.
Facilitator: Jobe
Timekeeper: Timex
Minutes: June Cleever
Primary Meeting Purpose(s): Learn How to Plan, Organize, Hold, Moderate & Facilitate More Effective meetings, determine 2011 second dues, and further discuss working with local Schools to sponsor them.
Guests: No one important

AGENDA:
2:00 – 2:15 PM: Minutes & Officer Reports
2:15 – 5:00 PM: Guest Speaker Daniel Feiman - Effective Meetings, Moderating, Facilitating
5:00 – 5:30 PM: Dinner
5:30 – 6:00 PM: Dues / Budget - Treasurer
6:00 - 6:30 PM: Symposium Planning
6:30 - 7:00 PM: Charity / Donations - Sponsor Local Schools – Dude
7:00 - 8:00 PM: Round Table Discussion - Everyone
Activity - meeting agenda

• What is good about it?

• What is not good about it?

• What should be deleted (if anything)?

• What should be added (if anything)?

• What should be changed (if anything)?
Your expectations

What do you expect from today’s discussions?

• To be able to use this for XYZ Co. meetings
• To use this in your operational meetings
• Other
• What else
What are the Top 25 Causes of Ineffective Meetings?

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Activity - Assessment

• Why do we have these meetings?
• What is our Vision?
• What is XYZ Co’s purpose?
• What do expect to accomplish at the meeting?
• What do need to accomplish at the meeting?
• How do we manage time?
• How should we handle parking lot issues?
Do You Need A Meeting

To help you think through your objectives, ask yourself the following four questions:

1. Why am I scheduling or attending this meeting?
2. What do I want to accomplish or gain?
3. What information will be exchanged or decisions made?
4. Who will be attending that I need to meet or gain their support?
Is a meeting the best way to accomplish the goals?

Determine if it will be used for at least one of the following reasons:

- To convey information to a group
- To solicit information from a group
- To answers questions
- To participate in group decision making
- To brainstorm ideas
- To solve problems
- To network
- To sell an idea, product, or service
- To show or provide support for others
How To Prepare For & Organize A Meeting

- Purpose:
- Facilitator:
- Participants:
- Pre-work:
- Roles:
- Structure:
- Location:
- Time:
- Agenda:
- Follow up:
Facilitator

- Begin on time
- Set the meeting tone
- Welcome everyone
- Establish and Use Ground Rules
- Introductions - Self vs. You
- Review & Use the Agenda
- Encourage participation – balance/respect
  - Quiet
  - Domineering
- Making sure everyone has a fair chance of being heard.
- Keep the discussion on track/topic
- Use a *Parking Lot Issues* list
- Keep the discussion moving *forward*
- Work toward decision/commitments
- Tie the discussion together
- Be flexible
- Summarize & thank everyone
- End on time
Facilitator II

Being a good facilitator is both a skill and an art.

• Facilitating a meeting requires someone to:
  – Understand the goals of the meeting and the organization
  – Keep the group on the agenda and moving forward
  – Involve everyone in the meeting,
  – Make sure that decisions are made democratically.
Activity - Video Review
Participants

- Confirm – yes or no

Do
- Pre-work completed
- Personally welcome new people
- Actively listen to others
- Support the facilitator in moving the agenda ahead
- Recommend ways to resolve differences
- Participate in discussions
- Encourage new people to speak and volunteer
- Help set up and clean up the room
- Be positive and upbeat throughout the meeting
- Tell a joke or add a light comment to ease the tension in a difficult discussion
- Be respectful

Don't
- Dominate the discussion
- Go off topic
- Dwell on past problems
- Insist that people support your ideas.
Pre-work

Why pre-work?
• Builds interest and preparedness for the meeting
• Keeps participants engaged
• Results in a personal connection with the facilitator
• Connects participants with others who will also attend the meeting
• Things to consider:
  – How can we set expectations to recognize the benefit of pre-work?
  – Whose responsibility is it to ensure that the pre-work gets done?
  – Can we get everyone to look at pre-work as if it were:
    □ a contract,
    □ a requirement,
    □ a marketing opportunity or
    □ an incentive improve the level of participation?
Keys to success:

• Ensure pre-work adds value
• Create a sense of urgency
• Provide incentives
• Make it fun
• Implement accountability
• Build a communication plan
Typical Roles In Meetings Include:

- Facilitator/Chairperson
- Note taker
- Timekeeper
- Presenters
- Tone-Setter
- Greeter
Structure:

• How should the meeting be organized to best accomplish the purpose? Some techniques may include:
  – guest speakers,
  – videos,
  – brainstorming sessions,
  – panel sessions,
  – discussion groups,
  – demonstrations, etc.
  – decision time
Location

- Sign In
- Chair Arrangements
- Displays
- Outlets for Audio-Visual Equipment
- Equipment Set-Ups
- Refreshments
Agenda

• Agenda:
  – A meeting agenda should be prepared and distributed to participants at least 3 days prior to the meeting day.
  – An agenda is crucial to meeting success in 3 ways:
    1. it clarifies the objectives so people understand the meeting purpose and tasks;
    2. distributing the agenda prior to the meeting helps participants plan and prepare to make an effective contribution; and
    3. during the meeting, the agenda provides direction and focus for the discussion.

There are a variety of agenda styles but essentially they should contain at least the following elements:
• title
• date
• location
• time – start/finish
• time allotments for each agenda item – need a timekeeper
• names of persons responsible for covering each item
• open discussion items, and
Summarize

Conclude the meeting by summarizing:

• The discussion
• Decisions made
• Tasks delegated
• Deadlines set
• Any actions required by participants
• Any review plans for follow-up
• The next meeting
• Possibly *Parking lot* issues, if they are relevant to the group
Activity - Role Play

- Facilitator/Chairperson
- Note taker
- Timekeeper
- Presenters
- Tone-Setter
- Greeter
- Participants
Meeting Checklist

- Have you set concrete, realistic goals?
- Is the site familiar, accessible and adequate?
- Are the date and time good for those you want to attend?
- Have you invited the *right* people?
- Have everyone confirmed?
- Does the agenda:
  - Accomplish the goals
  - Encourage commitment and involvement
  - Provide visible leadership roles
  - Have time limits
- Do you need:
  - Printed materials
  - Background information & materials
  - Proposals
- Have you asked people to serve as the:
  - Chairperson/facilitator
  - Note-taker
  - Timekeeper
  - Presenters
  - Greeter
- Have you considered the following logistical matters?
  - Chair arrangements
  - Flip charts and markers
  - Equipment needed & power
  - Refreshments
- What else is important?
Follow up

• Do it
• Meeting notes
• Action items
• Update those who missed the meeting
What have you learned today?
Daniel Feiman, MBA, CMC®, Visiting Professor

Consultant, Trainer, Author, Publisher, Reviewer

Daniel Feiman, MBA, CMC®, Visiting Professor is the Founder & Managing Director of Build It Backwards, a consulting & training firm based in Redondo Beach, CA. He turns Roadblocks into Roadmaps(SM) by teaching companies how to Assess, Achieve & Accelerate exceptional success; with measurable results in 90 days. His core competencies include: Strategy; Finance & Process. Mr. Feiman is an internationally recognized seminar facilitator; working with firms such as Apple, ADNOC (United Arab Emirates), ARAMCO (Saudi Arabia), California Institute of International Business & Economics, Credit Suisse, Hilton Hotels International, Institute for Supply Management (ISM), Mattel, PEMEX (México), Promigas (Colombia) Reliance (India), TRW, University of Manchester (UK), & others.

He is adjunct faculty at the University of California, Los Angeles (UCLA) Extension Department (since 1990) has taught at the University of Manchester (UK) & is the Visiting Professor at the Business School of the University of Huddersfield (UK).

He has consulted with firms in many industries including, manufacturing, distribution, financial services, oil & gas, education, healthcare, consumer products, legal, & hospitality. His diverse knowledge-base & world-wide contacts is leveraged to assist his clients in gaining advantages not available through other resources. (Please see www.BuildItBackwards.com for case studies and testimonials).

Mr. Feiman is a reviewer for the New York Journal of books (http://www.nyjournalofbooks.com/).

Build It Backwards Publishing (www.BuildItBackwards.com/Publishing) publishes business books with recognized expert authors targeting those who have decided to learn what they really need to know in the simplest straight forward way; without jargon. Mr. Feiman is the author of numerous articles and whitepapers, is a contributing author to several books as well as co-author of others. The next book in the series, (THE Book on…Business from A to Z: the 260 Most Important Answers You Need to Know) will be published this fall. He has been interviewed by television, radio & print resources.

Mr. Feiman has over 18 years’ experience in all facets of both the traditional & nontraditional commercial finance industry. These include lending, marketing, leasing, management and problem loan workouts.
Contacting us:

Daniel Feiman, MBA, CMC®
Managing Director
Build It Backwards™
Success by Choice; Not Chance℠

Office: 310.540.6717  Cell: 818.522.2892
Consulting & Training in:
Strategy * Finance * Process

dsfeiman@BuildItBackwards.com
www.BuildItBackwards.com
http://www.linkedin.com/in/danielfeimanbuilditbackwards