



# University of HUDDERSFIELD

## University of Huddersfield Repository

Feiman, Daniel

How to plan, organize, hold, moderate and facilitate more effective meetings

### Original Citation

Feiman, Daniel (2010) How to plan, organize, hold, moderate and facilitate more effective meetings. In: More Effective Meetings, 23rd August 2011, California, USA.

This version is available at <http://eprints.hud.ac.uk/id/eprint/12276/>

The University Repository is a digital collection of the research output of the University, available on Open Access. Copyright and Moral Rights for the items on this site are retained by the individual author and/or other copyright owners. Users may access full items free of charge; copies of full text items generally can be reproduced, displayed or performed and given to third parties in any format or medium for personal research or study, educational or not-for-profit purposes without prior permission or charge, provided:

- The authors, title and full bibliographic details is credited in any copy;
- A hyperlink and/or URL is included for the original metadata page; and
- The content is not changed in any way.

For more information, including our policy and submission procedure, please contact the Repository Team at: [E.mailbox@hud.ac.uk](mailto:E.mailbox@hud.ac.uk).

<http://eprints.hud.ac.uk/>

BUILD IT

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

Presented by:

Daniel Feiman, MBA, CMC<sup>®</sup>, Visiting  
Professor

## *Activity - Ice breaker*

1 word

- 2 groups
- 1 minute
- 1 word

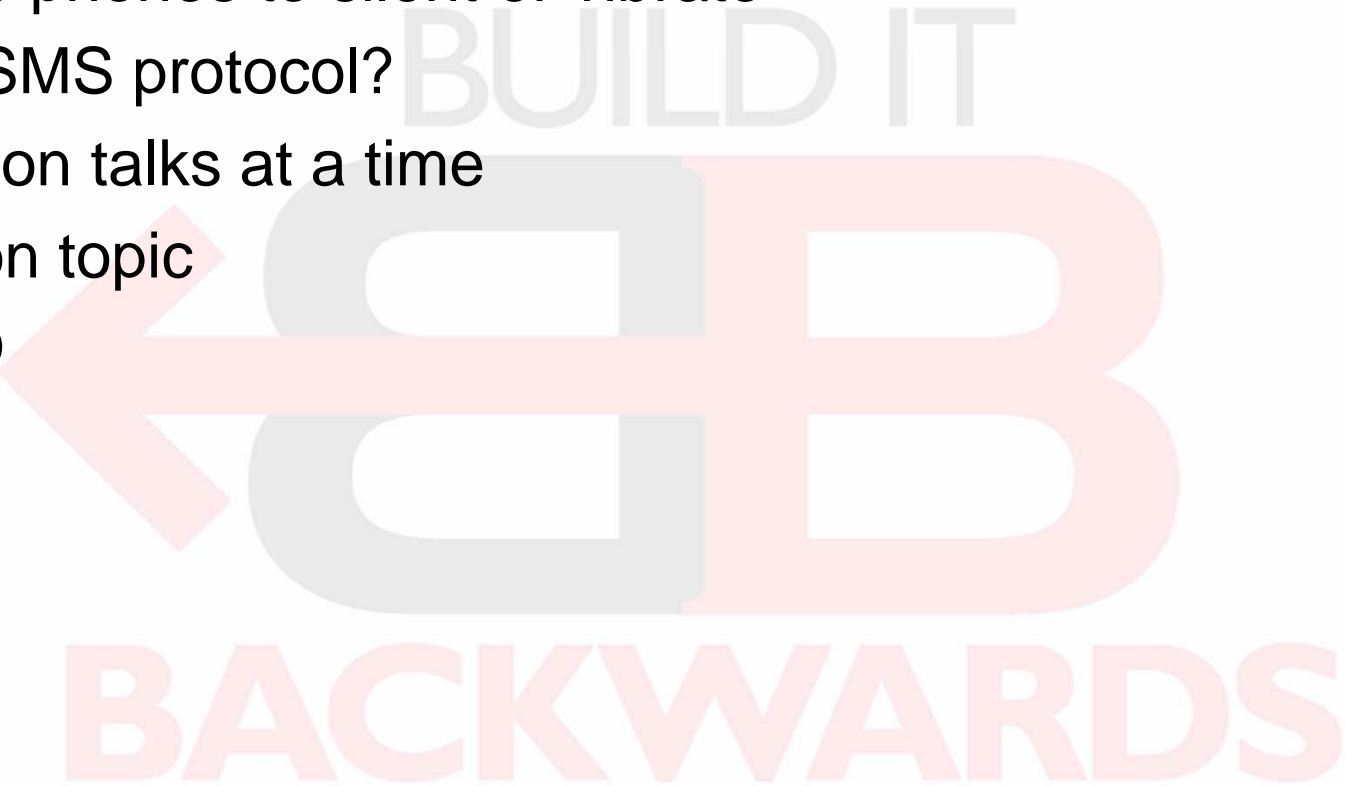


# Today's agenda

- 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

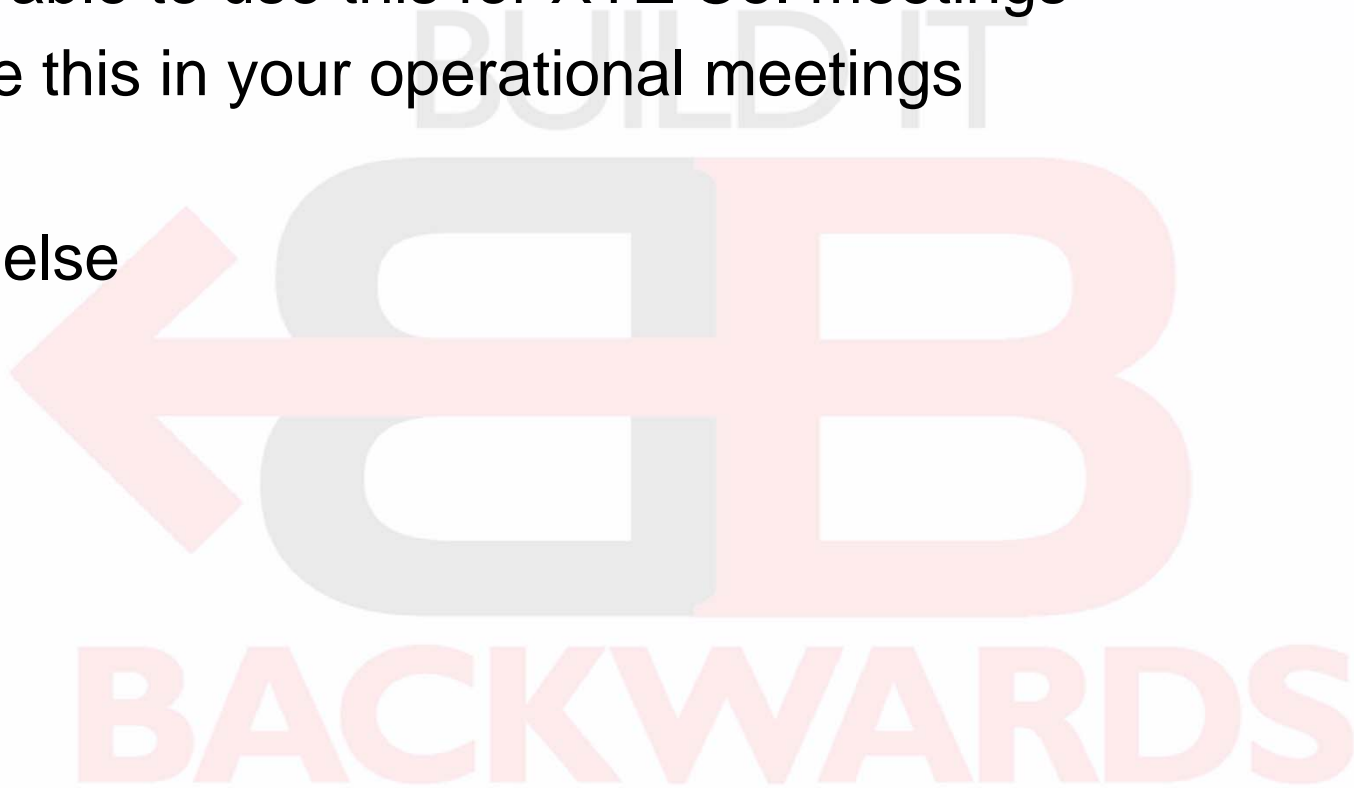
## *Activity - meeting agenda*

- 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?

- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- 10
- 11
- 12
- 13
- 14
- 15
- 16
- 17
- 18
- 19
- 20
- 21
- 22
- 23
- 24
- 25



## *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:



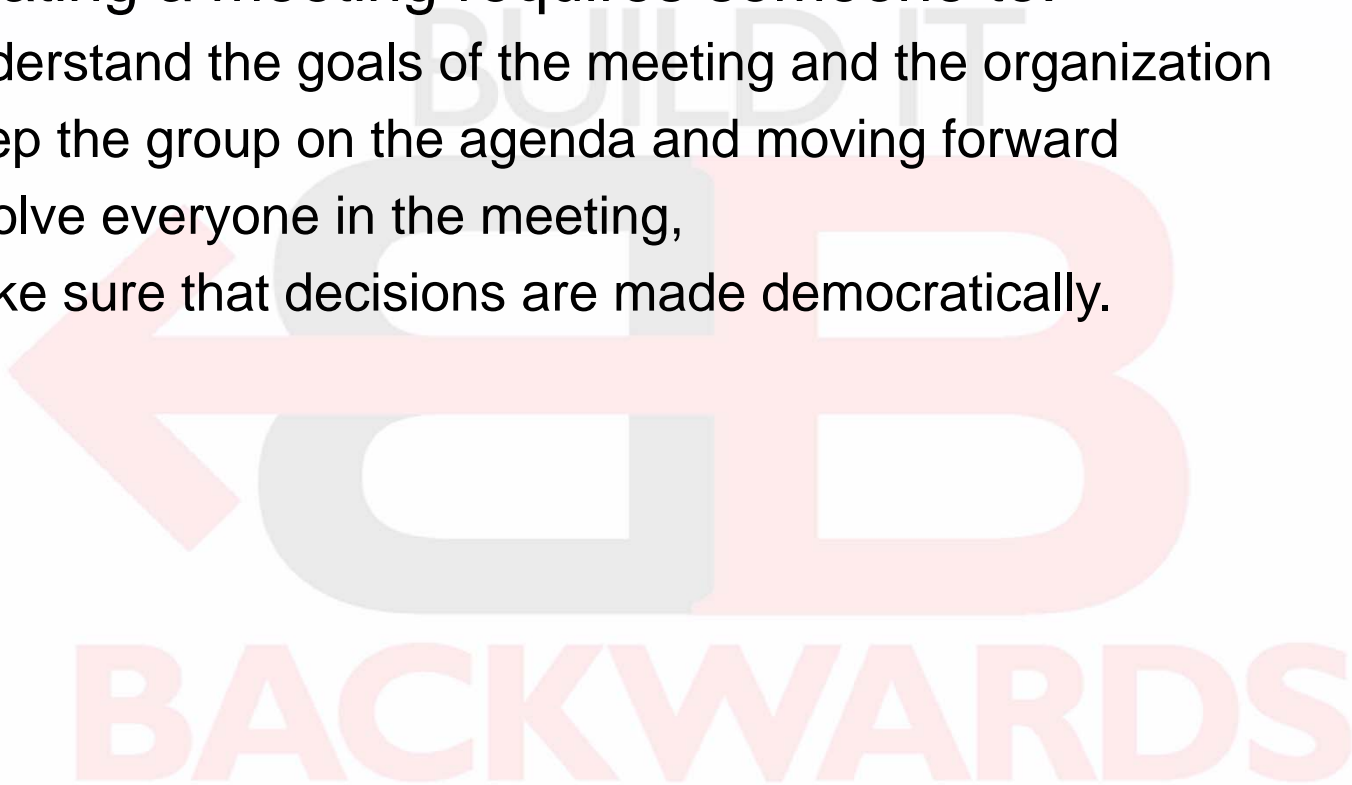
# Facilitator

- 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<sup>®</sup>, Visiting Professor

Consultant, Trainer, Author, Publisher, Reviewer

Daniel Feiman, MBA, CMC<sup>®</sup>, 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<sup>(SM)</sup> by teaching companies how to Assess, Achieve & Accelerate exceptional success; with measureable 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](http://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](http://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.

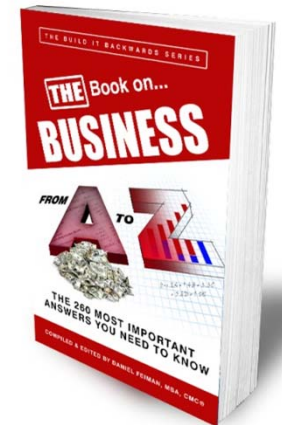
## Contacting us:

**Daniel Feiman, MBA, CMC®**

*Managing Director*

**Build It Backwards™**

*Success by Choice; Not Chance<sup>(SM)</sup>*



Office: **310.540.6717** Cell: **818.522.2892**

Consulting & Training in:

*Strategy \* Finance \* Process*

[dsfeiman@BuildItBackwards.com](mailto:dsfeiman@BuildItBackwards.com)

[www.BuildItBackwards.com](http://www.BuildItBackwards.com)

<http://www.linkedin.com/in/danielfeimanbuilditbackwards>