

A Step by Step guide to

Managing Effective Meetings

Agenda



Meeting



Tasks



your assistant from agenda to task completion

A Step-by-Step Guide to Managing Effective Meetings

This guide will help you have more efficient and effective meetings.

You can apply the lessons learned from this guide to all of your meetings whether you use MeetingKing or other tools, like Word and a separate task manager.

MeetingKing is your virtual meeting assistant and will make the entire documentation process from the agenda to task follow-up much easier. Try it for yourself and see how much time you save while improving your meetings. <http://meetingking.com>

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1 Why are Meetings Important?

Meetings are inspiring sessions where problems are discussed, decisions are made and tasks are assigned. But are they?

In many organizations employees consider meetings a waste of time, and should be avoided at all cost. It is not that we are not willing to have efficient and effective meetings; it is just that well somehow we just don't seem to have efficient and effective meetings.

This book will help you to change that.

We will guide you through the different steps before, during and after your meetings, so everyone will be engaged and you will get things done.

2 Meeting Goal and the Meeting Agenda

'A meeting without an agenda is like a ship without a rudder. It flounders around all over and accomplishes nothing'

Robert's Rules of Order

2.1 The Meeting Goal

First determine the goal of the meeting; **What** is it about? Without a clear goal the meeting will turn out to be a waste of time. Participants may wonder why they have been invited or may have a different understanding of the purpose of the meeting; Are we brainstorming or do we need to make a decision during the meeting?

The goal of the meeting forms the basis of the agenda, and who to invite. Keep your meeting goal as narrow as possible. It is often better to have multiple short meetings that are really focused on one topic than long meetings that cover totally different topics.

During the meeting, stay focused; only discuss those topics that are on the agenda and don't be tempted to discuss other issues. New issues can be discussed in another meeting.

If people don't know what the meeting is about and come unprepared, the meeting will become a pointless discussion dominated by people who like to talk. The meeting will not lead to a satisfying outcome. and the discussion may even be re-hashed in your next meeting.

Key points:

- Keep the focus of the meeting as narrow as possible
- What is it about - define the topics to be discussed
- Don't allow additional issues to interfere

2.2 The 3 W's for logistics

The goal of the meeting (What) drives everything. It dictates who should participate, when and where the meeting should take place and how long the meeting should last.



It sounds simple, but how many meetings have you attended where people who had nothing to do with the topic were invited? How many meetings could have been done with a phone call instead of a cross country flight? How many meetings were scheduled for an hour, even though 20 minutes would have been enough?

The goal of the meeting, and therefore the agenda, will determine the Who, Where and When.



MeetingKing Tip: Once you have defined to goal of your meeting be very critical when determining the Who, Where, When.

2.2.1 Who?

Involving the key players and decision makers in your discussion and decision process is very important. Not including the right people will make them feel left out. They will not have the motivation to execute a plan they had no say in, and you are not using their valuable experience in making the best decision.

On the other hand, you should not invite people who have nothing to do with the subject of the meeting. Jim from Sales does not need to attend a meeting with the IT department on whether or not to upgrade your servers and databases. Inviting people to irrelevant meetings not only wastes their time, it also sends a message that their time is not important and makes sure that they won't want to come to the next one.



Inviting the right people to the meeting will have a beneficial effect on your people's motivation and your organization's culture!

2.2.2 Where?

As the meeting organizer, you need to choose the location. Obviously, if all the people in the meeting work in the same location, it's an easy choice, but even then, you need to make sure that the space is comfortable for a meeting.



Meetings are social events. Lively discussions and interactions not only help bring the team and the company closer together, they also actively help people remember what the meetings were about.

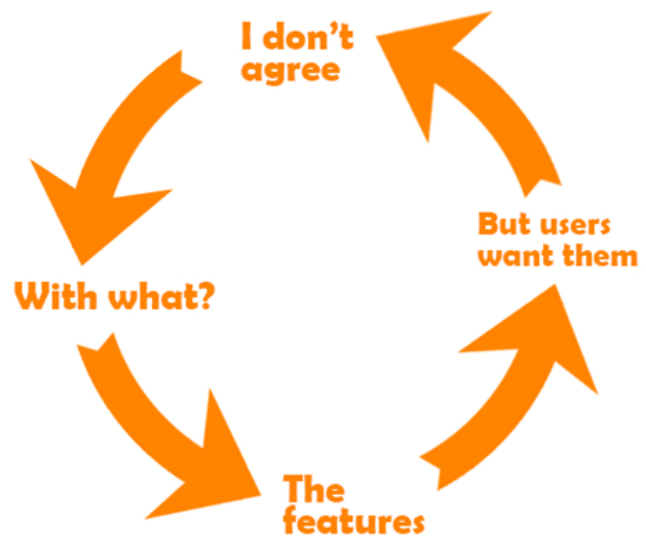
Of course, if the meeting includes participants in different locations, perhaps it's better to have a video conference, or at least with part of the team. Video conferences are a huge improvement over phone conferences and for most meetings more than adequate. [Read more on face to face meetings versus virtual meetings.](#)

2.2.3 When?

The 'When' includes both 'What time' and 'How long'. You need to make sure that the participants have enough time to prepare for the meeting, and the opportunity to suggest their own agenda items.

If the meeting participants aren't morning people – don't set a meeting for 8 a.m. That will only lead to frustration and to the meeting starting late.

The meeting and each topic should have a time limit. Nothing is worse than a discussion that goes on forever, with the same arguments repeated ad infinitum. You don't want Mike from QA taking up 40 minutes talking about the latest test case scenarios.



A time limit forces you to have a constructive discussion and come to a conclusion; a decision and action items. Of course this is only possible if you have a clear goal, an agenda and everyone is prepared!

Make sure your participants never leave the meeting with a feeling that it was a waste of time.

Psychological studies confirm what we all know: Long meetings are a waste of time.

Source: Scientific American



MeetingKing Tip: You can create an appointment in Outlook , iCal or Google Calendar and automatically create a meeting in MeetingKing. [More..](#)



*MeetingKing Tip: When you create the agenda, make sure to note who is presenting each topic and **how long** it will last.*

2.3 Creating the Agenda

A meeting agenda is...

"A list of topics that you want to discuss at the meeting. The agenda limits the scope of the meeting discussions, both in subject and in length."

Your agenda helps keep the participants both involved and focused, and so is a must-have for any meeting – whether a weekly team meeting, a board meeting, an annual review, or customer meeting.

To get the maximum commitment from your team, and to foster a real team culture, the meeting participants should have the opportunity to propose their related agenda topics. This can be done via email or a shared document, but of course one person has to maintain the master agenda.



MeetingKing Tip: With MeetingKing it's easy for invitees to add to the agenda, and all participants can see the complete agenda

2.4 Topics

In formal meetings, the agenda usually starts with approving the minutes from the previous meeting, then moves on to updates on the tasks that were delegated. Discussing the to-do list from the previous meeting will not only make sure things will get done, as no one wants to be the one to explain to everyone else at the meeting why they didn't follow through with their tasks. Discussing, or mentioning, completed tasks gives the team a sense of accomplishment.



MeetingKing Tip: MeetingKing automatically adds the tasks from previous meetings to the new agenda



MeetingKing Tip: MeetingKing offers standard meeting templates, and you can easily create your own.

When adding topics to the agenda make sure that they are related and that they are relevant to all participants. **Keep a clear focus.**



MeetingKing Tip: Place new issues, that come up during the meeting and are not on the agenda, in the Parking Lot. That way they won't be forgotten when preparing the next meeting agenda.

2.5 Supporting Materials

Make sure that any materials you need for the meeting are readily available for all. These could be reports, financial statements, emails, advertising brochures or wireframes of the new website.

Make these materials available in advance, so that participants have time to review them. Only with proper preparation you can have a meaningful discussion.



MeetingKing Tip: You can attach files to your meetings in MeetingKing, so that everything is located in one place.

2.6 Summary

As with everything, proper preparation is the basis for success; for a good meeting it is your agenda. Make sure you address the **what, who, when and where**, provide the right supporting material and require the participants to come prepared. With clear focus, your meetings will deliver results, your organization or project will move forward and the culture improve.

3 Meeting Minutes

'Memory is deceptive because it is colored by today's events.'

Albert Einstein

3.1 Why write meeting minutes?

Writing minutes takes time, and you might see it as getting in the way of “real” work. In reality, however, if you don’t write down what happens in the meeting, if you don’t record the decisions and tasks that were assigned during the meeting, you will waste both time and money.

Writing Minutes => Saves Time and Money

Meetings are all about arriving at decisions and people’s memories are notoriously unreliable at remembering what exactly happened. Did you decide for feature A and against feature B, or against feature A and for feature B. Everyone has his personal recollection of the outcome and decisions will be second-guessed at the next meeting, and tasks won’t be carried out.

Writing minutes has another advantage, it forces you to properly close and summarize a topic. You will be surprised how often there is confusion and disagreement even immediately after the discussion. Summarizing and writing it down provides the opportunity to clarify it then and there.

Meeting notes should be written down during the meeting, not after, so that they can provide a real record of what was agreed.

Proper minutes will ensure that things get done and prevent to have the same discussion over and over again.



MeetingKing Tip: MeetingKing automatically communicates tasks to the task owners and includes an integrated task manager



MeetingKing Tip: In MeetingKing you write down short bullets and save them as a Note, Decision or Task. MeetingKing will format them into professional meeting minutes

3.2 How To Write Meeting Minutes

Succinct minutes that capture the purpose of the meeting and its agreed outcomes are a record that can be referred back to and be used for follow up purposes later.

Good minutes are concise and to the point, but at the same time, they do not leave out critical information.

There should be one person taking the notes during the meeting. Since taking notes requires full attention this note taker is preferably someone who does not participate in the actual discussion. In small organizations it may be a good idea to change the meeting note taker from meeting to meeting.

- The recorder should be able to write the minutes in near final form as the meeting progresses. . . .
- The minutes should focus on results and agreed-on actions. .
- The minutes should be highly summarized, not a burden to read. Be brief; summarize outcomes and points of agreement and disagreement; don't record detailed input.
- Avoid writing minutes for the purpose of informing those who were not at the meeting. . . .
- Write the minutes soon after the meeting and distribute them promptly (within a day or two).

Murray Hiebert and Bruce Klatt, *The Encyclopedia of Leadership: A Practical Guide to Popular Leadership*. McGraw-Hill, 2001

3.3 What to include in your minutes?

1. The reason for the meeting

What is the meeting about? (Title)

2. List of attendees, location and date and time

First and last names , and email addresses. Also, list people who weren't there, but need to know the meeting outcome. Recording the date time and location is also a requirement.

3. Topics discussed

The agenda serves as the outline for your minutes document.

4. Notes

No one is looking for long essays but it is worth writing down important notes. That helps to place decisions and tasks in the right context.

5. Decisions

Write down decisions that were arrived at during the meeting. The minutes serve as a written record that these decisions were made.

6. Actions to take

Write down any actions or tasks that were agreed on. Information on tasks should include the task itself, who it was assigned to, and the date it should be completed by.

7. Items added to the Parking Lot

If you added anything to the Parking Lot make sure that is recorded in your minutes.

8. Follow up meeting

Schedule a follow up meeting. Write down the date, so everyone knows.



MeetingKing Tip: In MeetingKing all the participants can update and comment on meeting tasks in one centralized location



MeetingKing Tip: Meeting combines all the information listed above and formats it into professional meeting minutes. Sending your minutes with MeetingKing is as simple as clicking the 'Send Minutes' button

4 Meeting Tasks

A task is...

'a definite piece of work assigned to, falling to, or expected of a person; duty.'

Dictionary.com

4.1 Managing Meeting Tasks

When you hold a meeting, one of the most important outcomes is the list of tasks that need to be carried out.

During the meeting, as the agenda is discussed, a team to-do list will gradually emerge. In some cases, team members will volunteer to complete the tasks, in other cases the tasks need to be assigned to the most suitable team member.

In all cases, the tasks have to be written down as part of the meeting minutes, to make sure that they are carried out.



MeetingKing Tip: in MeetingKing Tasks are automatically tracked, and can be seen in the dashboard of the task owner and the meeting organizer.

Failing to write down agreed tasks following a meeting, makes managing tasks very challenging if not impossible. If not recorded in meeting minutes, action items will be forgotten, or not remembered correctly. Tasks won't be completed on time, not completed correctly, or not completed at all! You might even have to repeat the meeting, just to discuss the same topic all over again, to recall the tasks assigned!



Trusting participants to write down and manage their own tasks is a widespread practice, but without a central task list things will fall through the cracks.

If you have no mechanism to track and follow-up on your meeting tasks, your meeting was a waste of time.

4.2 How to Manage your Meeting Tasks?

1. Write Down Tasks

During meeting discussions tasks will emerge. Write them down immediately or they will be forgotten. Writing tasks down also prevents any confusion on what exactly needs to be done.

What should the task details include?

- Task name and what needs to be done
- Files related to the task
- The desired task outcome



MeetingKing Tip: Creating a task is as simple as writing a note. Type the task, select an owner and select a date.

2. Assign Tasks

Assign each task you write down to one of the people in the meeting. This person might not be the one who actually completes the task, but he or she is responsible and it is his or her job that the task is carried out.

Only one person should be assigned to each task. That way it is clear who is responsible and it makes your life as the meeting organizer easier too, as you only have to receive updates from one person per task.



MeetingKing Tip: The task owner can comment on the task, mark it complete and use MeetingKing to attach the required report.

Delegating Tasks

If you delegate tasks during a meeting, take into account the person's suitability to carry out a particular action.

Do they have the knowledge, skills and experience to complete the task? If not, will they have time to learn on the job? Perhaps it's better to delegate the task to someone with more experience, who will complete the task quickly.

Delegating tasks can be an excellent way to motivate employees and give them an extra sense of responsibility, but this must be managed depending on the specific project and available time.

3. Track Tasks

Write down the due date for each task. This date is sent out as part of the meeting minutes, reminding the task owner that the task has to be completed by a set date.

Setting a due date enables the meeting organizer to follow up and check on the task's progress, in relation to the due date.



MeetingKing Tip: MeetingKing has a built-in action item tracking software that can help you to keep track of all team tasks.

5 Summary

Running an effective and efficient meeting is not rocket science. If you properly prepare your meetings, document it and follow-up on everything you discussed, your organization or project will move forward.

Effective meetings not only save time and money, they also improve your company culture; there is clarity, focus and results are visible.

A bit of discipline is all that is needed. Of course a tool like MeetingKing that assists with all the administrative work around meetings is a great help!

[Sign-up now and try MeetingKing for you next meeting.](#)

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