

Notes:



STEP ONE: CLARIFY WHY

CLARIFY YOUR THINKING ABOUT THE MEETING

Before anything else, you need to know why you've decided to call a meeting. It's even worth asking, "Why should we bother to have a meeting?" In our experience, this stage is often overlooked or not fully thought through. Our advice is: don't hold a meeting unless you first ask why it's needed!

Thinking this through in depth can save a lot of time at the start of a meeting, because you'll be ready to answer questions from the participants. We've seen people questioning the leader of a meeting at the start - about the geography; the timeframes for a piece of work; and the items that will be discussed. If the leader isn't prepared, they will be caught off guard and the meeting could be thrown off track right away!

Once you're clear about the fundamental reasons for holding the meeting, you have a great foundation on which to build your design. In addition, people are much more likely to come to your meeting if they understand why the meeting is happening and what you expect of them.

A clear understanding of these reasons will also give you a reference point that will help to keep your meeting on track. If people start talking off-topic, you can refocus the conversation by reminding everyone about the main aims and therefore the focus of the discussions.

'To forget one's purpose is the commonest form of stupidity'
Friedrich Wilhelm Nietzsche

STEP ONE: CLARIFY WHY

Instructions

Use the template provided at the end of this step to work through the following items, so that you can form a stronger picture of the reasons why this meeting is being called:

- Purpose:** Establish the overarching reasons for the meeting:
 - ★ What do you want to happen as a result of this meeting?
 - ★ What would be the consequence of NOT having it?
 - ★ Where does this meeting fit in terms of your organisation's aims and challenges?
- Outcomes:** Think about what you want the meeting to achieve: please be as specific as possible. The clearer you are, the better focussed the meeting will be. For example, do you want to:
 - ★ Inform people?... So that they do what?
 - ★ Have a discussion?... With what aim?
 - ★ Gather opinions?... To use them where and for what?
 - ★ Make decisions?... Which ones and how will they be made?
 - ★ Generate ideas?... How many and how well developed?

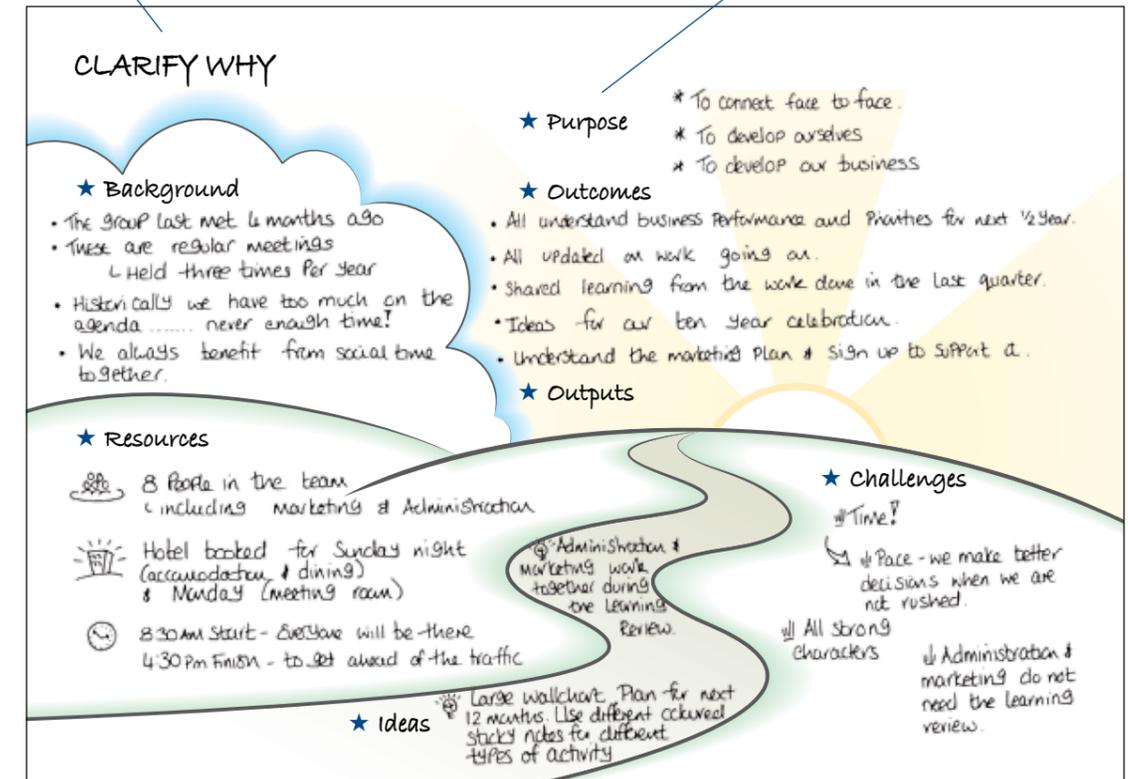
Think about, 'by the end of this meeting we will have.....'
- Outputs:** Be clear about what the meeting needs to produce in terms of physical outputs. This will make it easier for you to design the right processes needed to achieve effective outputs. Ask yourself:
 - ★ What information do we need to gain from this meeting?
 - ★ Who will use the different outputs, and when will they need them?
 - ★ What format should be used for the outputs (e.g. business plan, spreadsheet...)?
 - ★ Will the results of the meeting be fed into any specific systems or processes?
- Challenges:** What challenges do you already know about? What might get in the way of achieving the outcomes?
- Ideas for the meeting:** What ideas for content and design already exist?
- Resources:** What resources do you have available for this meeting e.g. people, budget, venue, information, time...? Who needs to be in this meeting?
- Givens:** What has already been decided and is apparently not 'up for debate'? You can write the answers to this key question anywhere on the template, depending upon where they belong best.

This stage is about gathering *your* thinking about the meeting. It is OK to have a personal slant on what you want to achieve. You can adjust this once you have heard from others, in Step Two.

Think about...

What do you want to happen as a result of this meeting?

What would be the consequence of not having this meeting?



These tips are specifically for virtual meetings.

TIPS

- ★ Working with someone else and sharing the finished template will enable you to check your thinking. This is particularly helpful if you're an extrovert thinker!
- ★ When you're noting outcomes, see how specific you can be. (For example, instead of 'Generate ideas', you might choose 'Generate seven ideas along with plans').
- ★ Keep referring back to this initial sheet when you work on the subsequent steps. This will help to ensure that your design will satisfy the larger organisational goals.
- ★ Virtual meetings are great for sharing information and giving status updates.
- ★ If you realise that you need the group to make decisions in your virtual meeting, preparation before the meeting and processing during it, are critical.
- ★ Be really clear about what you expect from participants before and during the meeting.

CLARIFY WHY

★ Background

★ Purpose

★ Outcomes

★ Outputs

★ Resources

★ Challenges

★ Ideas

Notes:



STEP TWO: UNDERSTAND EXPECTATIONS AND CONCERNS

EXPLORING OTHER PEOPLE'S VIEWS ABOUT THE MEETING

Once you've established the reason for the meeting, you need to know what each attendee is expecting to gain from it. A quick conversation with everyone beforehand will save you from having to try and understand (and meet) their varying needs *during* the actual meeting. This would be much harder and may also be too late!

Finding out the expectation and concerns of attendees can bring a number of benefits:

- ★ It helps everyone to start thinking about things before they arrive
- ★ The participants are more likely to feel part of the design
- ★ It ensures that the design is developed with everyone in mind (rather than in isolation)
- ★ It identifies ideas or resources that could help in the meeting
- ★ It can even lead to identifying additional people who should be invited and some who shouldn't attend!

The process of gathering this information needn't take long, but will prove very powerful in designing an effective meeting. The template we've provided for this step is a design/thinking aid and isn't intended to be used as a 'public document' once completed.

'Without involvement there is no commitment. Mark it down, asterisk it, underline it. No involvement, no commitment.'

Dr. Stephen R. Covey

STEP TWO: UNDERSTAND EXPECTATIONS AND CONCERNS

Instructions

Make contact with the proposed participants. You may need to clarify which meeting you want to talk about and when it is taking place. Explain that you'd value their input so that you can design a productive meeting. You can decide on how you contact them: face-to-face; by phone; or even by e-mail. A 'quick coffee' can be a good method.

Explore

Essentially, you need to ask them three key questions and record their answers on the template. (Other information may also surface, so make a note of that, too!)

- ★ What do you personally hope to gain from this meeting?
- ★ What could prevent this from being a great meeting?
- ★ Is there anything else that I should know about?

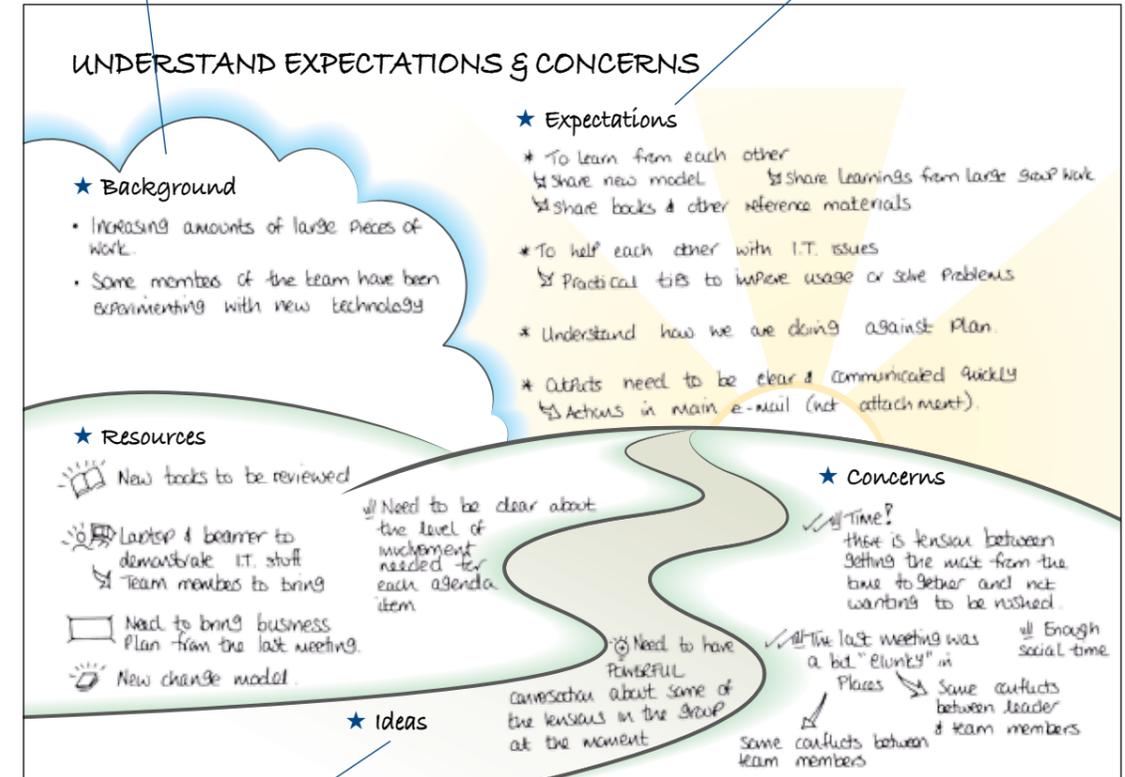
Record

Here are some ideas about what to record under the various headings:

1. **Expectations:** Different people may want different things from the meeting. They may be looking for something tangible; a specific output; or a key conversation or discussion. Their expectations could include items that hadn't previously been thought of as a necessary part of this meeting.
2. **Concerns:** These are all of the issues that could be barriers to the success of the meeting. Participants' concerns may be related to content, process, people, logistics or even something more personal. Make a note of everything - big and small - as any item could provide clues that will help you to develop a good design.
3. **Background:** People could give you information that puts the meeting into context, or that gives you an idea about their role or focus.
4. **Resources:** These include anything that could support the meeting's success - including the venue, number of people, and breakdown of roles (you may know this already). Through your conversations you may identify 'experts' who could help in the meeting; existing documents that could be used as inputs; or procedures that you may need to follow.
5. **Ideas:** The participants might suggest specific ways of conducting some of the work in the meeting, or tell you about items that are already supposed to be happening in the meeting - 'givens'.
6. **Anything Else:** This is the 'catch all' area! People may mention anything from their own travel plans to other company work or decisions or even confidential issues (e.g. they are about to leave the company!) It's all worth knowing at this stage. You need to decide where you think these items belong on the template.

Don't get overwhelmed with background. Focus on the key points that relate to the meeting.

Listen for the similarities and the differences when you explore people's expectations. Try to write down their *exact* words, so that you can communicate the outcomes later in the words that work best for the group.



Some people may offer suggestions about *how* you run the meeting. It is extremely useful to find out *why* they want to do it in that way.

TIPS

- ★ Working in this way can help you to build up a bank of powerful questions to ask the group. Keep a note of these for next time!
- ★ Try clustering similar comments together as they arise. Write your early notes far apart from each other to leave room for later material.
- ★ If you want, use one sheet per person and then copy each contribution across to a master version. This two stage approach can help you to process the data and could also help you to spot any common patterns and unique elements.
- ★ If you want to get the group's commitment to decisions in a virtual meeting, it is vital that you complete this step.

UNDERSTAND EXPECTATIONS & CONCERNS

★ Background

★ Expectations

★ Resources

★ Concerns

★ Ideas