

# Basic Guide to Conducting Effective Meetings

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(Information in this topic is adapted from the [Field Guide to Leadership and Supervision](#).)

## Sections of This Topic Include:

**Selecting Participants**  
**Developing Agendas**  
**Opening the Meeting**  
**Establishing Ground Rules**  
**Time Management in Meetings**  
**Evaluating the Meeting Process**  
**Evaluating the Overall Meeting**  
**Closing the Meeting**

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Meeting management tends to be a set of skills often overlooked by leaders and managers.

The following information is a rather "Cadillac" version of meeting management suggestions. The reader might pick which suggestions best fits the particular culture of their own organization. Keep in mind that meetings are very expensive activities when one considers the cost of labor for the meeting and how much can or cannot get done in them. So take meeting management very seriously.

The process used in a meeting depends on the kind of meeting you plan to have, e.g., staff meeting, planning meeting, problem solving meeting, etc. However, there are certain basics that are common to various types of meetings. These basics are described below.

(Note that there may seem to be a lot of suggestions listed below for something as apparently simple as having a meeting. However, any important activity would include a long list of suggestions. The list seems to become much smaller once you master how to conduct the activity.)

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## Selecting Participants

- The decision about who is to attend depends on what you want to accomplish in the meeting. This may seem too obvious to state, but it's surprising how many meetings occur without the right people there.
- Don't depend on your own judgment about who should come. Ask several other people for their opinion as well.
- If possible, call each person to tell them about the meeting, its overall purpose and why their attendance is important.
- Follow-up your call with a meeting notice, including the purpose of the meeting, where it will be held and when, the list of participants and whom to contact if they have questions.

- Send out a copy of the proposed agenda along with the meeting notice.
- Have someone designated to record important actions, assignments and due dates during the meeting. This person should ensure that this information is distributed to all participants shortly after the meeting.

## Developing Agendas

- Develop the agenda together with key participants in the meeting. Think of what overall outcome you want from the meeting and what activities need to occur to reach that outcome. The agenda should be organized so that these activities are conducted during the meeting.

In the agenda, state the overall outcome that you want from the meeting

- Design the agenda so that participants get involved early by having something for them to do right away and so they come on time.
- Next to each major topic, include the type of action needed, the type of output expected (decision, vote, action assigned to someone), and time estimates for addressing each topic
  - Ask participants if they'll commit to the agenda.
    - Keep the agenda posted at all times.
  - Don't overly design meetings; be willing to adapt the meeting agenda if members are making progress in the planning process.
- Think about how you label an event, so people come in with that mindset; it may pay to have a short dialogue around the label to develop a common mindset among attendees, particularly if they include representatives from various cultures.

## Opening Meetings

- Always start on time; this respects those who showed up on time and reminds late-comers that the scheduling is serious.
  - Welcome attendees and thank them for their time.
- Review the agenda at the beginning of each meeting, giving participants a chance to understand all proposed major topics, change them and accept them.
- Note that a meeting recorder if used will take minutes and provide them back to each participant shortly after the meeting.
  - Model the kind of energy and participant needed by meeting participants.
    - Clarify your role(s) in the meeting.

## Establishing Ground Rules for Meetings

You don't need to develop new ground rules each time you have a meeting, surely. However, it pays to have a few basic ground rules that can be used for most of your meetings. These ground rules cultivate the basic ingredients needed for a successful meeting.

- Four powerful ground rules are: participate, get focus, maintain momentum and reach closure. (You may want a ground rule about confidentiality.)
  - List your primary ground rules on the agenda.
- If you have new attendees who are not used to your meetings, you might review *each*

ground rule.

- Keep the ground rules posted at all times.

## Time Management

- One of the most difficult facilitation tasks is time management -- time seems to run out before tasks are completed. Therefore, the biggest challenge is keeping momentum to keep the process moving.
  - You might ask attendees to help you keep track of the time.
- If the planned time on the agenda is getting out of hand, present it to the group and ask for their input as to a resolution. (Also see [Time Management](#).)

## Evaluations of Meeting Process

- It's amazing how often people will complain about a meeting being a complete waste of time -- but they only say so after the meeting. Get their feedback during the meeting when you can improve the meeting process right away. Evaluating a meeting only at the end of the meeting is usually too late to do anything about participants' feedback.
  - Every couple of hours, conduct 5-10 minutes "satisfaction checks".
- In a round-table approach, quickly have each participant indicate how they think the meeting is going.

## Evaluating the Overall Meeting

- Leave 5-10 minutes at the end of the meeting to evaluate the meeting; don't skip this portion of the meeting.
- Have each member rank the meeting from 1-5, with 5 as the highest, and have each member explain their ranking
  - Have the chief executive rank the meeting last.

## Closing Meetings

- Always end meetings on time and attempt to end on a positive note.
- At the end of a meeting, review actions and assignments, and set the time for the next meeting and ask each person if they can make it or not (to get their commitment)
- Clarify that meeting minutes and/or actions will be reported back to members in at most a week (this helps to keep momentum going).

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### Sample Team Meeting Ground Rules

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Revised: March 29, 2002

**Participants attend meetings** Team members are expected to attend and participate in scheduled project team meetings (or notify the project leader in advance of schedule conflicts)

**Meetings start and end on time** Meetings will begin promptly at the specified time, whether or not all team members are present.

Meetings will conclude as scheduled

**Participants are punctual** Team members will arrive promptly at the appointed time and place of the meeting.

**Meetings are uninterrupted** Team members will make arrangements as necessary to avoid being interrupted during the meetings.

Emergency interruptions due to unavoidable reasons are acceptable.

**Participants engage in active listening**

Team members will pay attention to what is being discussed so they can participate actively in the team discussions

**Participants don't take part in one-to-one meetings or sidebars**

All team members will participate in the same meeting and will discuss items being handled by the team. Questions, ideas, and thoughts are shared with the whole team.

**Everyone participates actively** Each team member will bear individual responsibility for contributing actively to a constructive group process that supports the team efforts to complete specified tasks and/or achieve agreed upon goals.

**Participants show a willingness to reach consensus on decision issues**

Team members will agree with the team's decisions and/or will support the decisions made by the team.

When the team cannot reach consensus, an agreed upon alternative method for reaching a final agreement is implemented.

### **Sample Team Meeting Ground Rules**

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Revised: March 29, 2002

**Participants respect the agenda** All meetings will have an agenda. The agenda and any additional materials to be discussed at the meeting should be distributed to team members ahead of the meeting.

The agenda, as developed by the meeting leader, will be followed unless/until the approach outlined on the agenda for addressing an issue doesn't work.

**Participants are free to check process and ground rules**

Each team member shares responsibility for keeping the meeting on track, and should not hesitate to call for a process check or a review of the ground rules.

**Meetings will take place when an**

**appropriate number and representation of team members are present at the meeting**

Meetings will be canceled if there is not the appropriate number and representation of team members available for the meeting.

**Breaks will be included in meetings** Breaks will be included in all meetings that run longer than one hour and a half in length.

- Only one person at time talking
- Meetings will start and finish on time
- Confidential information will "stay in the room"
- No jargon or in-talk
- No discussion of ideas until all ideas heard
- Encourage full participation from all attendees
- Keep discussion on topic, and focused
- If you agree to do something, do it.
- If you can't attend, send a suitable, informed, delegate instead.

## **Team Ground Rules (Code of Conduct)**

(a starting point - neither all-inclusive nor exclusive)

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### **Attitudes:**

We will be as open as possible but will honor the right of privacy.

Information discussed in our group will remain confidential. With regards to peoples' opinions, what's said here stays here.

We will respect differences. We won't discount others' ideas.

We will be supportive rather than judgmental.

We will give feedback directly and openly; it will be given in a timely fashion, and we will provide information that is specific and focuses on the task and process and not on personalities.

Within our group, we have the resources we need to solve any problem that arises. This means that we will all be contributors.

We are each responsible for what we get from this team experience.

Practice self-respect and mutual respect.

Build self-esteem. Respect each person.

No finger pointing -- address the process not the individual.

Criticize only ideas, not people.

Everyone is expected to help facilitate, critique, and evaluate the meeting.

Everyone is expected to participate and to respect and support the right to be heard.

Be willing to forgive.

Share air time, work from your own "learning edge" and acknowledge that others are at different places

Expect to change your own mind, but don't expect to change another's mind.

Watch for "trigger words" -- language IS important.

If need be, agree to disagree.

Be open to new concepts and to concepts presented in new ways. Keep an open mind. Appreciate other points of view.

Do not accept the first idea -- go for the second and even better the third.

Everyone is responsible for the success of the meeting.

Be an "Adventurer" not a "Prisoner".

Be a team player. Respect each other's ideas. Question and participate.

Relax. Be yourself. Be honest.

Be willing to make mistakes or have a different opinion.

Keep confidences and assume others will as well.

Accept personal responsibility for team outcomes.

Share your knowledge, experience, time, and talents.

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## Process:

Have fun! Yes, you may be having a very serious discussion but life is too short to get hung up on it. Ideally everyone should leave the meeting feeling better for it and that their involvement was critical to its success.

We will use our time wisely, starting on time, returning from breaks and ending our meetings promptly.

Publish agenda and outcomes.

Review and agree on agenda at start of meeting and then stick to it. But ...

Do not be fanatical about it; e.g., go with the flow - if things are progressing and the ideas are flowing that are relevant, keep it rolling.

We will ask for what we need from our facilitator and other group members.

Attend all meetings. Be on time.

Absenteeism permitted if scheduled in advance with the leader.

When members miss a meeting we will share the responsibility for bringing them up to date.

100% focus and attention while meeting.

We will keep our focus on our goals, avoiding sidetracking, personality conflicts and hidden agendas. We will acknowledge problems and deal with them.

Keep to the current topic. (Avoid side bar discussions while others are talking.)

Stay focused on the task and the person of the moment.

Communicate, communicate, communicate - before, during and after the meeting - to make sure that action items are properly documented, resolved, and assigned to a responsible individual and given a due date.

Phones or pagers on "stun" (vibrate, instead of ring or beep) during the meetings. Unless on standby for recall, turn them off. We will not make phone calls or interrupt the group unless we are called out by a true emergency.

Everybody has the right to sit and listen (lurk) during formative stages of the team and even from time to time later during the team's operation. Do not deny anyone 'think time'.

No one should feel silenced and if you do, take it up with the facilitator.

One person talks at a time.

Include everyone in the discussion. Share the limelight.

Participate enthusiastically.

Don't interrupt someone talking.

No "killer" statements; don't shoot down ideas. Be open.

Differences or conflicts -- handle them openly and positively.

Practice both active and reflective listening. Before making your point, confirm to the group that you have understood the views of others by restating their point in your own words and seeking agreement that you truly understand the prior points.

Frequently check for understanding -- summarize and paraphrase frequently to ensure that what is being said is being heard and understood. Work towards explaining consensus.

Ask a question whenever you have one. Feel free to share an illustration, if only to test your understanding of the points being discussed.

Request an example if a point is not clear.

Ensure every learner participates at least every hour.

Rotate responsibilities.

Allow the recorder to participate in the conversation but make sure that the material being discussed is still captured.

Take notes (clear, concise, complete, accurate). Do not place the entire burden for documenting the meeting on the recorder.

Say "Thank you".

"Ask Why five times" (peel the onion layer by layer).

About 5 minutes before the scheduled conclusion of the meeting, take a quick consensus:-

Are we where we want to be or are we still on a roll?

Is this a good breaking point or do we want to go for another 15 minutes?

(If all can't stay, you should break it up. Do not send the signal that one member's contribution is more important than another's -- even if the departing member says "Carry on," close the meeting.)

Group Critique - Openly at the conclusion of the meeting and as needed during it.

Take a census at the conclusion of the meeting:-

Did we cover what we wanted to cover?

Are there things you liked or did not like?

How can we do them differently next time?

If the purpose of the meeting is to reach a decision, make sure the decision maker is actually at the meeting and that the required people who need to provide inputs are either present or adequately represented.

Job titles and rank are left at the door.

Keep up-to-date.

Commitment is demonstrated when members understand and accept responsibilities, and tasks are achieved.

Provide key point notes to participants.

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[Additions, changes to or comments on this list are welcomed. Please forward them to [Phil Richardson](#). I claim no pride of authorship in this list though I do like it and make it available precisely because I think it is useful for small group process improvement. This list is a compilation of lists from other nameless instructors and students, reorganized and consolidated with minor additions from me.

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## Effective meetings: Some ground rules

Washington Business Journal - by Joan Lloyd

Team meetings -- for training, brainstorming, planning or some other reason -- can run amuck in hundreds of ways.

People aren't prepared, they show up late, they engage in side conversations, or they remain silent, then have the real meeting out in the hall.

After facilitating literally thousands of meetings over the past 25 years, I have found a few ground rules that really work to set boundaries and create an environment where people can participate in a safe and meaningful way.

Many of the meetings I facilitate are charged with emotion.

Often, a team is in conflict, or communication has broken down. Sometimes a change is being implemented, and suspicion runs high. Sometimes trust is low.

So the ground rules I use stimulate communication and create respectful, honest give and take.

If you've never used ground rules before, you may be wondering how they work. Before the meeting, write them on a flip chart and post them on the wall.

Discuss each one and what it means. Ask if anyone has any others to add to make the meeting more effective.

Below are some of the ground rules I use and why I use them. Perhaps they will be useful for your team meetings, whether your team is in crisis or not. They will serve as a set of expectations to keep your meetings productive and participative.

- Everyone participates.

Although this may seem obvious, it often isn't. When you state upfront that you expect all team members to speak, it creates greater participation.

- Different opinions are welcome.

Contrary views usually need to be encouraged.

If you don't give permission for them during the meeting, you will likely hear about them after the meeting, which renders the meeting a waste of time.

- Disagree in private; unite in public.

Team members shouldn't show outsiders their dirty laundry.

This ground rule is designed to prevent people from walking out of a meeting and bad-mouthing the group to other colleagues or disagreeing (later) with a decision they participated in at the meeting.

For instance, consider this comment a manager said to an employee: "In our managers' meeting there was disagreement about that policy. Especially Charlie. He never goes along with the rest

of the group. No wonder he has such problems in his department! I don't agree with the decision, so I'm going to do what I want."

Comments like this will undermine the decision and breed disrespect.

- Silence is agreement.

This ground rule is golden. Too often a person will sit quietly while everyone else is voicing opinions about a topic. Then later that afternoon the silent person can be heard saying, "Well, I didn't agree to that."

- Limit side conversations.

Sometimes I am facilitating a meeting with over 50 people, and issues are emotional or controversial.

If the group is large, this ground rule sets the expectation upfront that people need to focus on the conversation instead of buzzing with their neighbor.

- Start on time; end on time.

In many corporate cultures, people show up late for meetings.

Read more: [Effective meetings: Some ground rules - Washington Business Journal](#)

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They miss important dialogue and decisions and generally disrupt the discussion. I don't like "punishing" the prompt by making them wait for the stragglers.

At the other end are members who tend to double book themselves for multiple meetings or schedule meetings so close together they must leave early to make it to their next one.

Inevitably, they get up to leave as key decisions are being made.

This ground rule establishes that you will be respectful of people's time and you expect them to respond in kind.

- Follow through on action plans.

If members of a group make a decision or agree to take action, they should be accountable for following through.

If they lack the discipline to do what they say they will do, it erodes the meeting's effectiveness and creates the need for more meetings to rehash what has already been decided.

Usually, you don't have to mention the ground rules after you've discussed them once.

However, if one of them is being violated, you can gently remind the group or speak to someone after the meeting.

Often, I hear members of the group remind each other of the ground rules: "Remember, silence is agreement. Do we all agree? Speak up now."

Ground rules do work.

*Joan Lloyd owns Joan Lloyd & Associates, a Milwaukee management consulting and training firm that specializes in leadership development, organizational change and career management.*