Management Essentials
Leading Meaningful Meetings

Tips and techniques to ensure that your meetings meet their intended outcomes.

Everybody Loves Meetings!

(said no one ever)













Leading Meaningful Meetings

- The four Ps of effective meetings
- When to have to meeting
- How to prepare for meetings
- Who to invite
- How to deal with common challenges in meetings
- Tips for virtual and hybrid meetings

Poll

On average, how many hours do you spend in meetings per week? (Round up to the closest hour and answer in the chat.)

A. 3 hours

B. 6 hours

C. 10 hours

D. 15 hours

E. Over 15 hours

We have a lot of meetings....

The Taxonomy of Business Meetings

- Congenial Meetings
- Formal Meetings
- Intense Meetings

LUCID

Cadence Meetings

Team Cadence

Weekly Team Meeting
Daily Huddle
Working Session



Progress Check

Project Status Update
Portfolio Review
Stakeholder Update



One-on-One

Manager One-on-One
Coaching Session
Mentoring Session
"Catching Up"



Action Review

Retrospective
Win/Loss Review
Pre-Surgery Meetings



Governance

Board Meeting
Quarterly Strategy Refresh
Client QBR



Catalyst Meetings

Idea Generation

Solution Brainstorm
Ad Campaign Ideas
Requirements Brainstorm



Planning

Project Planning
Product Planning
Campaign Planning
Event Planning



Workshops

Design Workshop
Team Building
Value Stream Mapping
Kickoff
Chartering



Problem Solving

Root-Cause Resolution
Incident Response
Plan Reset



Decision Making

Strategic Opportunity
Candidate Selection
Final Approval



Context: Learn and Influence Meetings

Sensemaking

Investigations
Informational Interview
Market Research
User Testing
Discovery



Introductions

Sales Call
First Interview
New Hire Introduction
Investor Pitch



Issue Resolution

Support Escalation
Contract Negotiation
Dispute Resolution



Community of Practice

Meetups
Safety Committee
Lunch-n-Learn



Training

Skills Certification
New Hire Training
Client Training



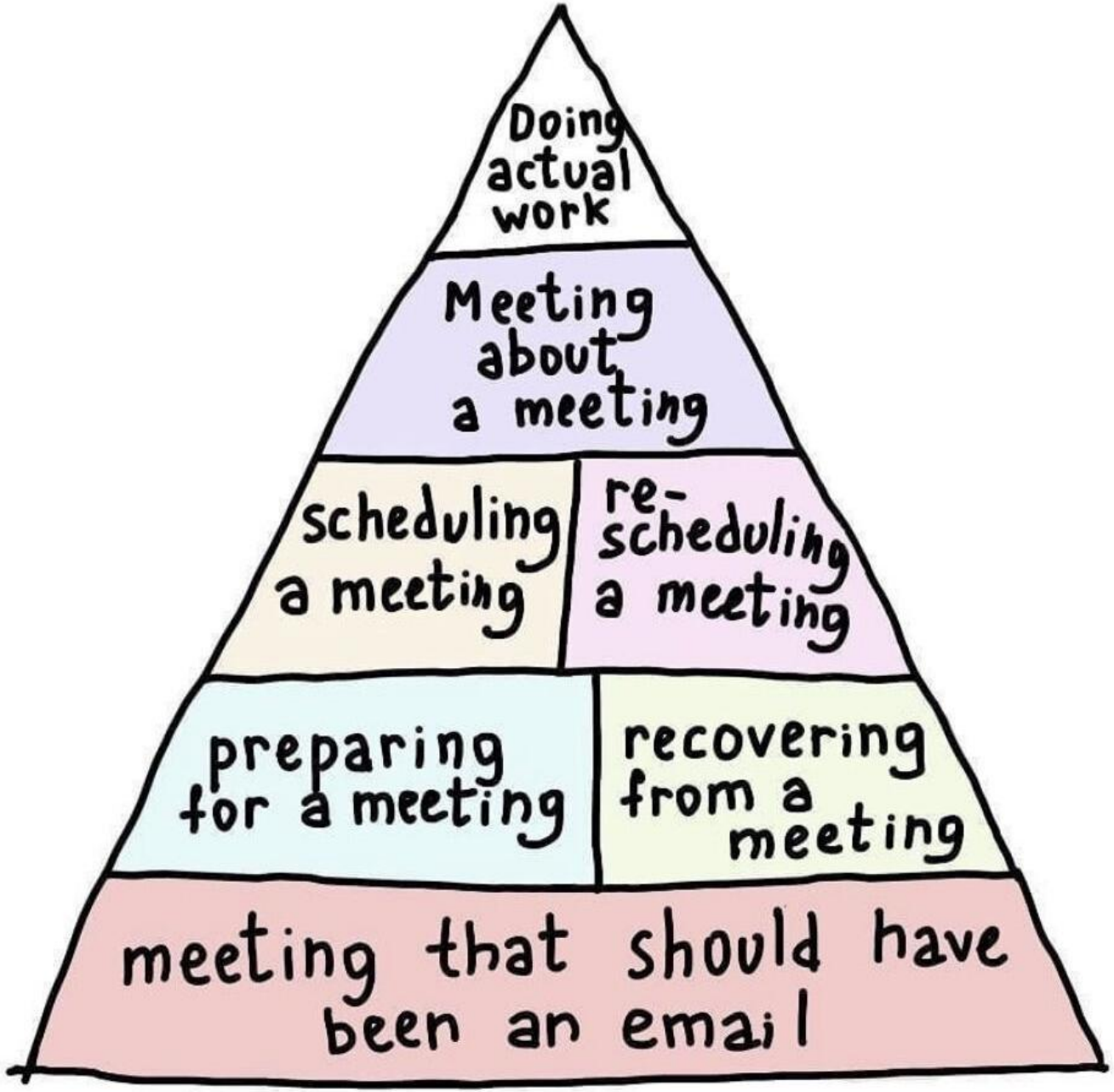
Broadcasts

All-Hands
Webinars
Press Briefing



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Sometimes it feels like this is how we spend our time...



Irina Blok

Answer in the chat

How do you know a meeting was effective?

The 4 Ps of Effective Meetings

Purpose
The meeting accomplish its objective(s).

People
The right people were there.

Process
It ran smoothly.

Participation
People felt included and heard.

Answer in the chat

What are some good reasons to have a meeting?

Purpose

Reasons to have a meeting



Make a group decision

Provide an important update

- sensitive topic
- questions, misinformation or ambiguity
- wide impact

Gather information to make a decision

Ask for help, gather input, brainstorm solutions

Build a relationship

Gain alignment

Recognize, celebrate, rally the troops

Answer in the chat

Should you have a meeting?

There are rumours swirling about your team moving to a different division. You know that it will be happening but there are still variables being worked out regarding whether certain team members will be moving to a different team.

Answer in the chat

Should you have a meeting?

You are leading a project, haven’t seen the project team in three weeks and don’t have a good grasp of where people are.

Answer in the chat

Should you have a meeting?

Your executive director cc’d 12 other leaders asking for input on an initiative you are leading. Now there are multiple threads in your inbox, some talking about aspects of the initiative you haven’t been looped in on. You are finding it hard to keep track of the conversation.

Know the Purpose

Share the purpose 3 times.

1. **In the meeting invite.**

2. **In the agenda.**

Topic	Purpose	Presenter	Time
	Inform (tell)		
	Discuss (collect input)		
	Decide		

3. **Verbally, at the start of the meeting.**

Prioritize the agenda

Put the most important decision items first

- **What decisions need to be made by the end of this meeting?** Build the agenda around that.
- Decide in advance how decisions will be made: consensus, vote, other?
- Limit items or decision/discussion to 3 or 4 per hour.

Put quick/easy information updates in the middle.

Put items that could be rescheduled at the end.

Don’t forget to schedule breaks.

TIP: USE A CONSENT AGENDA FOR DECISION ITEMS

- Provide background materials at least 5 days in advance
- Use decision time only for questions and decisions – not to re-review the background materials



Quiz

To maintain focus and engagement, how often should participants be offered a break?

A. Every 15–20 minutes

B. Every 60–75 minutes

C. Every 2 hours

D. Only when someone requests one

Answer:
B. Every 60–75 minutes

Source: Microsoft Human Factors Lab research

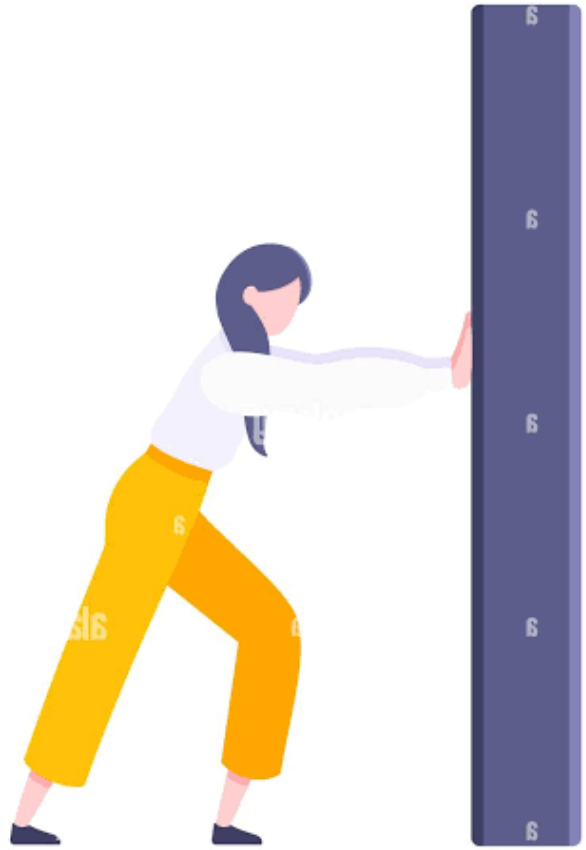
Buffer your meetings

In the meeting agenda

- For every 30 minutes, leave 5 minutes

Around your meetings

- Block time for follow-up communications and blocking in next steps



Give a thumbs up if...

You've ever been in a meeting and thought, "I don't need to be in this meeting."

Invite the Right People

People

The 8-18-1800 Rule



To make a decision:
no more than 8 people

To brainstorm, generate ideas:
up to 18 people

To provide updates, rally the troops: up to 1800

People

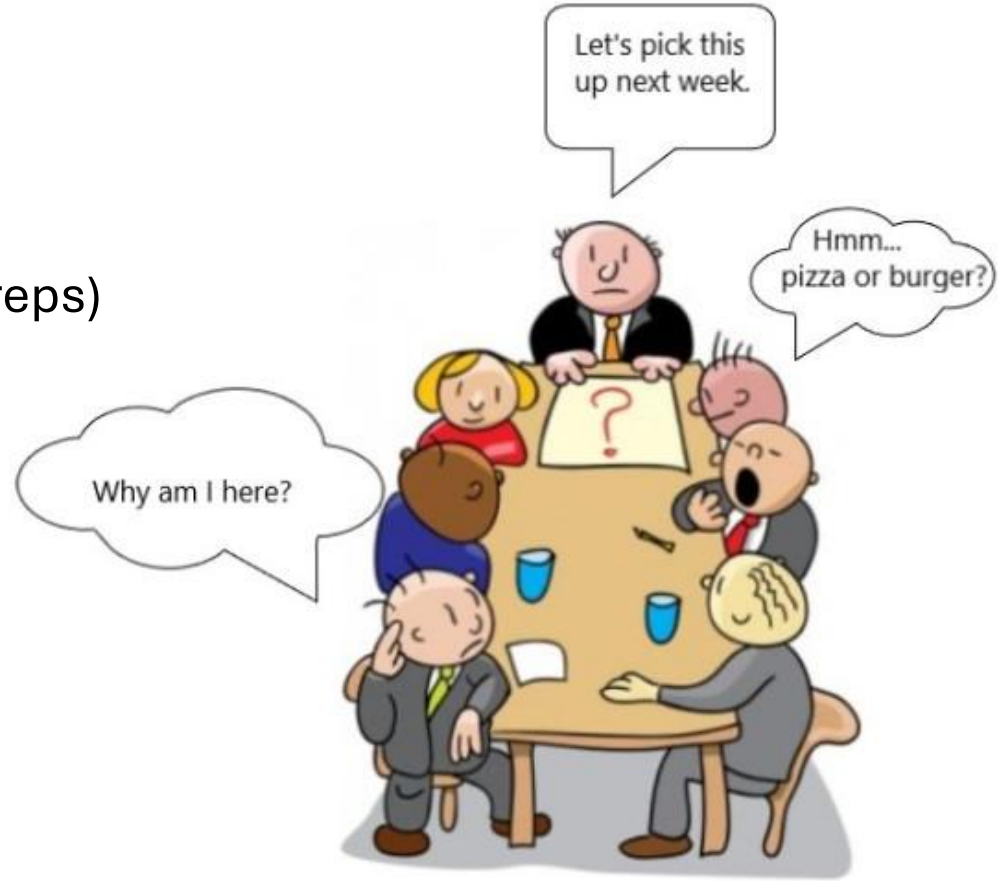
Invite the right people

For decisions and input you want

- Key decision makers
- Subject matter experts
- Implementor (or implementor rep.)
- Directly impacted stakeholders (or stakeholders' reps)
- Minute-keeper, scribe, timer

For others consider

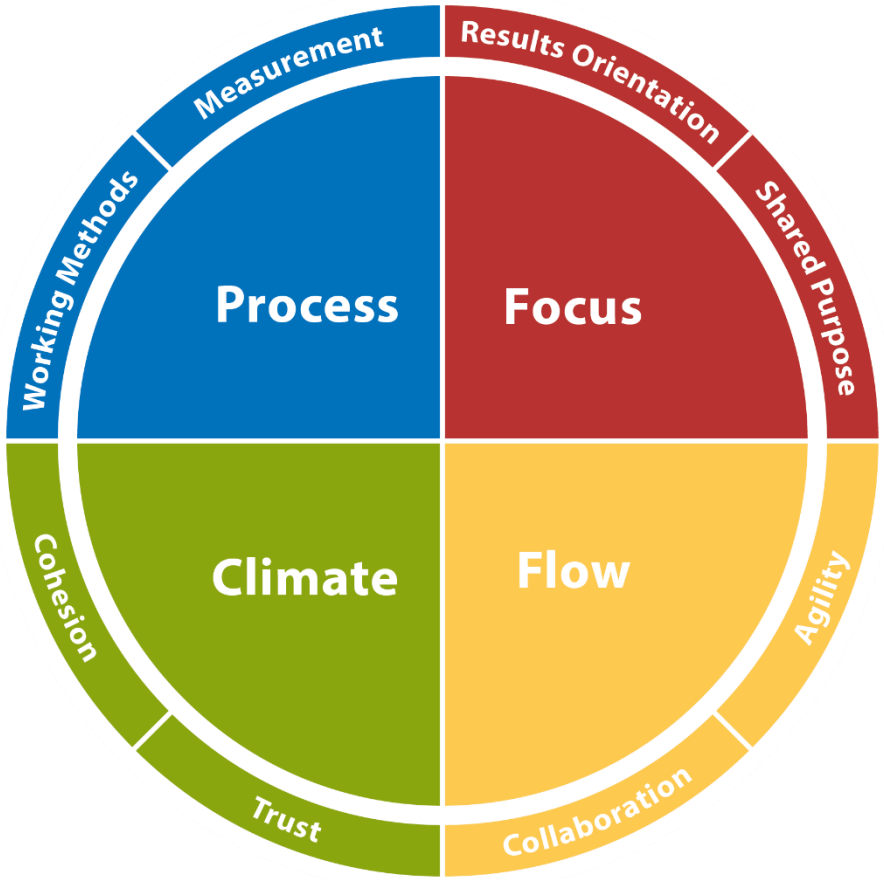
- Partial attendance
- Sharing the minutes or an update after



People

The four people at your meeting

- Send agenda in advance
- Send all supporting and decision documents in advance
- Include space to discuss process



- Include desired outcomes in advance
- Include space to discuss strategy, vision, progress
- End with clear accountabilities

- Ask for input on the agenda in advance
- Rotate facilitators, scribes, timekeepers and other roles
- Leave space in agenda for personal/team issues

- Leave space in the agenda for unexpected conversations and ideation
- Include team-building and/or engaging activities
- Meet face-to-face (cameras on or in-person) where possible

What could possibly go wrong?

Answer in the chat.

Why do meetings get off track?

Process

Don’t let tech disrupt a meeting

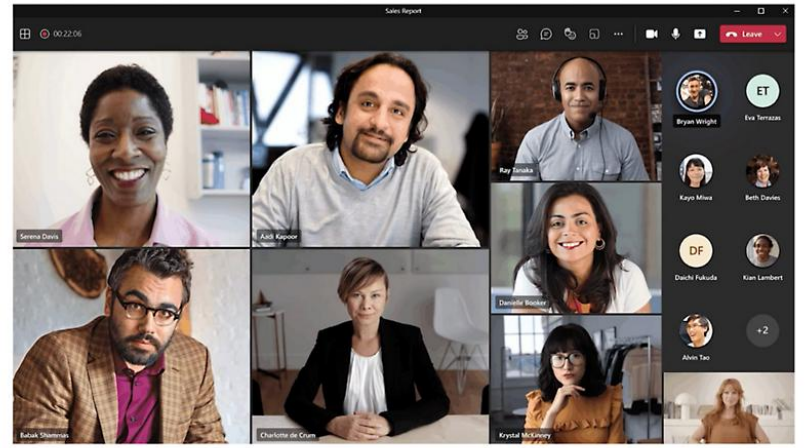


Know how to use your tech

- know the software/app (Teams, etc.)
- know how to coach others on tech (e.g., freezing, how to unmute, etc.)
- test in advance
- ensure your internet is adequate
- for complex and large meeting, have someone dedicated to tech

Set techpsectations up front

- cameras on or off
- how to weigh in (hand up, chat or other)
- what to do if you have technical issues
- recording
- what do to if you need to leave or attend to something off-screen
- how to use the chat
- will you be sharing content after
- **Put the above at the top of the chat for latecomers.**
- **Treat hybrid meetings as virtual meetings where people bring their laptops (if possible) and speak into the camera**



Don’t lose track of time



Stick to the time allotted.

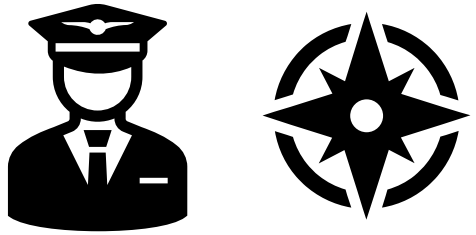
- Use a timer or have someone act as timer.
- Ask them to give you a signal when you have a certain amount of time left.
- Periodically remind the group how much time is left.

Answer in the chat.

Your meeting is scheduled to start at 10 a.m.

It’s 10 a.m. and 4 of the 10 people who are supposed to be there have arrived. Do you start without them?

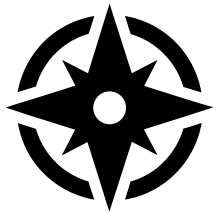
Set the tone at the start



1. Start on time.
2. Welcome participants as they arrive or give them something to do in the chat.
3. Review the agenda /purpose with participants.
4. Establish or review ground rules.
    - End on time
    - Agree about how decisions made, and who is final decision-maker
    - Set time limits on each decision, ask for group approval if need to go beyond time
    - Agree to listen without interruptions
    - How people can weigh in (hand raise, etc.)
    - No cellphones/ emailing during the meeting
    - Cameras on, etc.

Keep the meeting on track





- Follow the agenda.
- For each item, state what the intended outcome is (inform, discuss, decide).
- Acknowledge people waiting to speak.
- Notice body language in the room and act accordingly.
- For decision-making capture perspectives on a whiteboard or flip chart.
- Recognize when the group has come to an agreement, reiterate it and move on.
- Be willing to adjust the agenda on the fly if the group agrees.

Participation

Common Participation Challenges

- Discussion moves away from the original topic.
- One or two voices dominate.
- Quieter participants remain unheard.
- Lack of participation.
- Multitasking during the meeting.
- Teams leave without decisions, next steps or deadlines.

The Slippery Six

The Dominator



- Answers every question first
- Interrupts or talks over others
- Brings conversations back to their own perspective

Impact: Other participants disengage and valuable perspectives are lost.

Tactic:
Thank and transition

You've given us several points to consider. I'd like to hear from others as well.

The Silent Participant

- Keeps camera off and remains quiet
- Responds only when directly asked
- Shares ideas after the meeting instead of during it

Impact:
The team misses insights and leaders can't gauge true agreement or concerns.

Tactic: Call on directly.

Maria, What's your perspective on this?



The Conversation Drifter



- Introduces unrelated topics
- Chases interesting but low-priority issues
- Gets caught in details

Impact: The meeting runs over time and key objectives are not achieved.

Tactic: Create a parking lot or “take it offline”

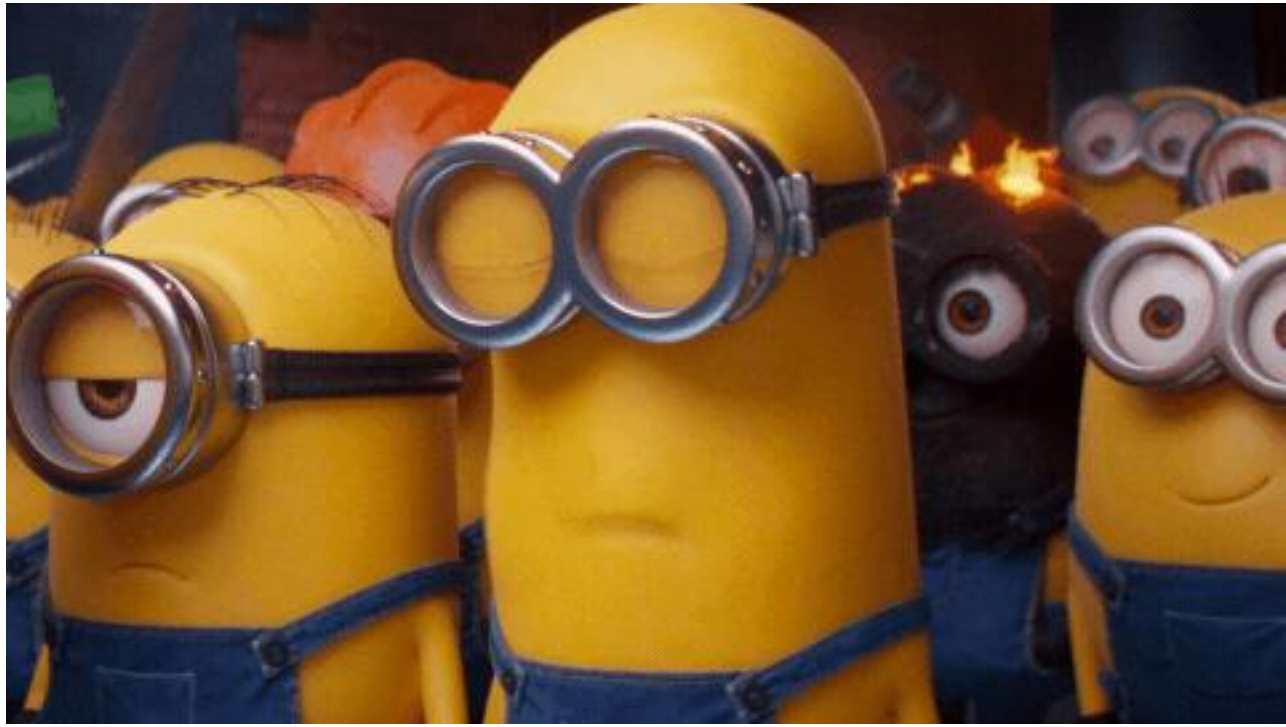
That’s an important issue. Let’s discuss that offline. To return to the task at hand…

The Meandering Talker

- Thinks aloud in circular ways
- Keeps speaking when nervous
- Rarely comes up for breath

Impact:
Time is lost. Other participants get frustrated.

Tactic: Mention the time and ask them to summarize.



How would you sum that up in one sentence?

The Critic/ Complainer



- Focuses on why ideas won't work
- Revisits past grievances
- Uses phrases like "We've tried that before“

Impact:
Innovation slows and group energy declines.

Tactic: Acknowledge and ask for solutions

I can see you are very passionate about this. To play devils advocate, what would it look like if it did work?

The Multitasker



- Checking email
- Working on other tasks
- Repeatedly asking questions that were already answered

Impact:
Slows progress and signals that the meeting isn't important.

Tactic:
Set ground rules.

Let’s return to the ground rules.

Group Discussion

The Weekly Operations Meeting

1. **Which behaviour would you address first, and why?**
2. **How would you redirect Mark's off-topic comments without shutting him down?**
3. **What would you say to encourage Priya to contribute?**
4. **How could you manage Alex's tendency to dominate the conversation respectfully?**
5. **What techniques could you use to help the group reach a decision and move forward?**
6. **What would you do if these behaviours continued throughout the meeting?**

You are facilitating a 45-minute weekly operations meeting with six team members. The goal is to make a decision about staffing for the next month.

20 minutes into the meeting, several challenges emerge:

Alex, a senior employee, responds to almost every question first and frequently interrupts others before they finish speaking.

Priya has expertise on the topic being discussed but has not spoken once.

Mark keeps bringing up unrelated issues from another project, causing the conversation to drift off track.

Sarah appears distracted and is checking emails while others are talking.

The group spends 15 minutes debating a small detail, and no decisions have been made.

You notice some participants are becoming quieter and disengaged.

As the meeting facilitator, you need to keep the meeting productive while maintaining positive working relationships.

Effective Meetings End Effectively

Answer in the chat.

Which of the following steps do you typically take at the end of the meetings you facilitate?

A. Summarize what was accomplished and key takeaways

B. Clarify action items, who is responsible for each and when each is due

C. Immediately schedule a follow-up meeting if required.

D. Ask the group for an evaluation of the meeting (at the meeting or telling them you'll email them later)

E. Thank everyone for participating.

Send a Summary Email ASAP

- Who attended
- Meeting objectives
- Decisions made (for some decisions, how they were made)
- Action items: who, what, when
- Next meeting
- A thank you



The 4 Ps of Effective Meetings

Purpose
Think about and share the goal(s) of the meeting

People
Only invite the people who need to be in the room

Process
Prepare in advance.

Participation
Manage challenging participants

Answer in the chat.

Which will you focus on in the next meeting you facilitate?

A. Purpose
B. People
C. Process
D. Participation

Test Your Knowledge

Take the quiz.

How was this training?

Take a photo of the QR code or click the link.

