

Meeting Guidelines – for Effective Meetings DTC Sales and Marketing Division

Whilst there is probably little that is new here or unique to DTC, these bits of common sense have been shown to clearly improve the effectiveness of meetings elsewhere. However obvious and simple these guidelines might appear, it will undoubtedly take a concerted effort by everyone within Sales and Marketing to change the current meeting “culture”.

These guidelines are broken down into what is hopefully a logical sequence starting with meeting preparations, meeting notification, conducting the meeting and finally closing and reviewing the meeting. Whilst many of these suggestions are acknowledged best practice, it may be the case that they do not fit comfortably within DTC or Sales and Marketing in particular. Where this is the situation, feel free to remove or amend these to fit the local needs.

Whilst distributing the Guidelines for Effective Meetings is a positive start, PSA have found that individuals need regular reminders of what is expected of them at meetings. To assist with this we have often made up an abridged version of the Guidelines and posted a large copy of this in each and every room or office where meetings might take place. This Meeting Charter can act as a continual reminder of the behaviours outlined in the Guidelines.

In addition to the Guidelines for Effective Meetings, I have also attached a copy of an Action Log which we at PSA (and many of our clients) have used as a replacement for meeting minutes. The action log is filled in by hand at the meeting (usually by an appointed or volunteer scribe), photocopied and given to all participants before they leave. This ensures that any actions can be commenced immediately after the meeting without having to wait for the minutes to be typed up and circulated.

I hope these guidelines give you a useful place from which to start changing the Sales and Marketing meeting culture. If there is anything else I can do to assist you in this process, do please let me know.

Nick Hyatt
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Effective Meetings Guidelines

Should we hold a meeting?

1. Why are you calling this meeting – What is the **purpose** and objective(s)?
2. Does it meet other participants **needs** as well as your own?
3. Is a meeting is **the best way** to achieve your goal
 - Are you having this meeting because you always have done?
 - Could an **alternative** means be used, phone, e mail, video conference?
 - What would happen if you did not hold this meeting?

Preparation

4. Invite **ONLY** the people who **REALLY** need to attend or really want to be there.
 - Meeting effectiveness has been proven to decline with increasing numbers of participants - try to keep the numbers below 12 where possible.
5. Distribute at least three days in advance a **meaningful agenda**
 - Meeting Subject
 - Meeting Purpose
 - Meeting Outcomes
 - Location
 - Attendees
 - Start time
 - End time
 - Items for the agenda listed in order of importance
 - Agenda to have times against each item
 - Agenda items to identify clearly the objective and outcome required
 - Any preparation work, pre-reading or analysis distributed with the agenda
6. Short highly focused meetings are normally more effective than lengthy ones. Make the agenda achievable in the time available. Meetings that look like they will last more than 90 minutes either need splitting up or a break incorporating in the running order.

Attending the meeting

7. Complete your **preparations** before hand – avoiding back to back meetings may help to carve out the opportunities to prepare for forthcoming meetings.
8. Arrive on time and **start** the meeting regardless of latecomers.
 - Don't penalise the prompt by making them wait .

9. Get straight to business. Don't fill the first ten minutes with 'catching up' chat. Save this for the end of the meeting.
10. Chair or item sponsor to **introduce** each agenda item – including the subject, the purpose and the expected outcome (a decision, a recommendation, an action point etc).
11. Pay **attention** and listen
 - If you can't give the meeting your full attention you perhaps ought not to be there.
12. Speak one at a time and don't cut across each other.
13. **Challenge** the idea or concept rather than the person.
14. Everyone is responsible for ensuring that participants stay **focused** upon the overall meeting and each agenda items purpose – don't let people wander onto 'pet' subjects.
15. Staying on time is everyone's responsibility - not just the chair.
16. Summarise frequently to keep on track and to ensure that everyone has the same understanding.
17. Allow people to **leave** after their input has been made or topics have been addressed. Don't create 'meeting hostages'.
18. Allow people to **arrive** after the meeting has commenced if their section is towards the end and the earlier parts do not concern them.
19. **Summarise** action points to ensure actions are understood by all present.
20. Consider the use of an **action log** rather than taking full and in depth minutes.
21. **Finish** on or ahead of time. If the meeting ends 20 minutes early, don't feel compelled to drag it out to the expected finish time.
22. Take time to **review** the meeting process before participants leave. How well did we handle this meeting? What could we do to **improve** for the next time?

Meeting Review

23. Was the meeting purpose clear and valid?
24. How useful was the agenda? Was it distributed in sufficient time?
25. How well did we stick to the times? Why?
26. Were the correct people present?
27. What worked well at this meeting?
28. Have we achieved all that we set out to? Why?
29. What will I do for the next meeting?

Meeting Charter – Within Sales and Marketing we will...

- 1) Come Prepared
- 2) Follow the Agenda
- 3) Start on Time – End on Time
- 4) Focus upon the goals and objectives of the meeting
- 5) Pay attention and listen
- 6) Speak one at a time
- 7) Give everyone equal chance to participate
- 8) Summarise frequently progress and decisions
- 9) Leave the meeting if you are no longer required
- 10) Share the responsibility for successful and timely meetings
- 11) Ensure actions are clearly recorded
- 12) Review the meeting before departing

Meeting Review – How did we do?

- Was the meeting purpose clear and valid?
- How useful was the agenda? Was it distributed in sufficient time?
- How well did we stick to the times? Why?
- Were the correct people present?
- What worked well at this meeting?
- Have we achieved all that we set out to? Why?
- What will I do for the next meeting?

Action Log

Meeting _____

Date _____

No.	Action	Who responsible	Date due	Review date	Completed
Present		Copies	Date of next meeting		