Anatomy of a Meeting
By Joan Abney

“According to a 2007 Microsoft survey of 38,000 people in 200 countries, on average, people spend 5.6 hours each week in meetings and 69 percent of those surveyed feel meetings aren’t productive. Staff meetings that are poorly-planned will not only waste time and money, but will deflate the enthusiasm and motivation of your staff. With a little planning, however, meeting outcomes dramatically improve.

“Most business professionals attend a total of 61.8 meetings per month and research indicates that over 50 percent of this meeting time is wasted. Assuming each of these meetings is one hour long; professionals lose 31 hours per month in unproductive meetings, or approximately four full work days.”

Even if you may only have a staff meeting once a week, once a month, or even just once a quarter, your meeting goals should energize and motivate staff, not leave them yawning and feeling like it was a big waste of their time.

Not everyone may have the responsibility to facilitate a meeting in the practice, but there may be occasions that put you in the position to lead a meeting such as serving on a state paraoptometric board, chairing a local fundraising event, or organizing a team of volunteers for a vision health fair.

A simple definition of a meeting is two or more people getting together to exchange information. It may take place in a formal meeting room, or in non-traditional locations such as alongside a pool or under the shade of a tree at a picnic table. The length of time devoted for the meeting may vary from five minutes to several hours. Topics of discussion, or the agenda, may include only one item or a multitude of various topics.

One of the first things to do before scheduling a meeting is to ask, is the meeting necessary? Is there another cost-effective way to communicate the information such as the use of email, phone calls, or web-based project management and collaboration tools like Basecamp, Team Box or Quickbase? These tools can maximize productivity with relatively little time needed for face-to-face meeting time. With increased costs involved in meeting face-to-face, many offices have begun using technology to conduct business. AnyMeeting.com offers free and low-cost web conferencing, video conferencing...
and webinar services for small business, with all the features and capacity of expensive services; sends email invitations for meetings for up to 200 people, or promotes meetings on Twitter and Facebook. Software features include sharing your screen, application sharing, sharing PowerPoint and PDFs, and video conferencing to name just a few. There are services provided for free as well as expanded service for fees. This is only one choice; there are other web applications that offer similar services.

Next, determine who are the key players necessary to attend? Will they contribute something to the meeting or obtain necessary information by attending? Will the meeting topics specifically assist them in increased productivity or reaching goals? If the answers to these questions are no, then they should not be expected to attend. Some meetings should be mandatory, but not all meetings need to include everyone.

Reasons for a meeting

There are different reasons or occasions to have a meeting. Here are a few of them:

1. There may be a need for an Information Sharing or Progress Reporting Meeting. This type of meeting shares the same information, to everyone, at the same time. It is a means of clarifying priorities, communicating last minute changes, minimizing resource conflicts, reviewing financial reports or listening to project manager reports.

2. Another time to call all staff together is a Decision-Making/Strategizing Meeting. It may be necessary to gain multiple perspectives and varied expertise in order to understand a situation or sequence of events, identify alternatives, make a decision, uncover risks, or assess consequences. Having flip charts or write boards located around the room enables staff to brainstorm and visually organize ideas. You may even appoint one person to have Internet access during the brainstorming portion of the meeting in order to look online for possible ideas or solutions.

3. There may be times that everyone needs to be brought together for an Announcement Meeting which acknowledges the accomplishments of a group or an individual that deserves public recognition. Another occasion may announce when the practice has something to celebrate (launch of a new program, achievements of goals, finish of project on/ahead of time, promotions, etc.). It’s a time to break out the sparkling water or grape juice served in champagne glasses!

4. Education/staff training meetings can be incorporated with other types of meetings with a specific time frame set for the education to take place, or with the entire meeting devoted to staff development and training.

The atmosphere and expectations may be different in each type of meeting. Most meetings should be taken seriously and participants should act in a professional manner. A financial review meeting would have low tolerance for fun and games. Announcement meetings, on the other hand, have a much more relaxed, celebratory atmosphere. Making a joke or humorous comment would be more acceptable in this type of meeting environment. Being a professional means knowing the difference, and demonstrating appropriate behaviors.
Key elements of successful meetings

There are four key elements of a successful meeting. The first one is participation. “Most professionals who meet on a regular basis admit to daydreaming (91%), missing meetings (96%) or missing parts of meetings (95%). A large percentage (73%) says they have brought other work to meetings and 39% say they have dozed during meetings.” In order to have a productive meeting it is essential that all participants are engaged in the conversation taking place. They should be contributing ideas, offering suggestions, and their body language should indicate they are paying attention. It is the facilitator’s responsibility to make sure participants are listening to the information being presented, by asking questions, discussing the issues, and advocating their point of view.

In a large group, there may not be enough time for everyone to contribute, but there should be time devoted on the agenda for opportunities for input and discussion. If one of the participants starts to dominate the conversation, open up the floor for others to contribute by asking something like “do other people have an opinion on this?” or “who haven’t we heard from?” This will create an opportunity for others to participate. For those reluctant to get involved in the conversation, simply state, “Mary, how do you feel about this?” This is an easy way to pull those who are shy or inexperienced into the conversation and keep them engaged.

The next important element of the meeting is Process Management. The facilitator must guide the meeting through the agenda and keep the group focused on the task. They will be encouraging participation while making sure everyone is on the same page. Their expertise and skill in facilitating a meeting will help the group build clear action plans, assign responsibilities for the task to specific people with deadlines and hold them accountable.

Once called to order, Meeting Information Management is another key element to a successful meeting. It is important to keep a record of what occurred during the meeting. Appoint someone to keep the minutes; a written account of the meeting. The minute notes should organize the information and keep track of information, agreements, and action plans. The minutes should be distributed within 24 hours following the meeting.

When Decision-making is the primary purpose for the meeting, the facilitator will need to lead the participants to identify root causes of problems, develop solutions, establish milestones, evaluate options and identify critical success factors. It is a good idea for the facilitator to have some items ready to add to the list to jump start the group’s thought processes. After thorough discussion of several options, the group should be able to collaborate to make decisions.

Working through the decision-making process may be new to some staff. Attending a professional meeting may be intimidating to them, or hard to follow. Help them understand how the process works by outlining the proposal, then asking for ideas and solutions. Encourage and accept all ideas as potential solutions. The dynamics of group interaction can stimulate thinking or prompt a person to raise a concern that might otherwise go unmentioned, or spark a solution that may not have been considered before. Once all ideas have been presented, narrow down the options by eliminating duplicates, prioritizing, advocating and evaluating each one. Finally, select the best approach and confirm agreements.

Not all staff may be in agreement with the decision. It is important for everyone to understand that once the decision is made, everyone needs to support the decision regardless of their personal
feelings. Allowing everyone the opportunity to voice opinions and concerns, prior to the final decision, should help them to accept and support the consensus of the group.

**Preparing the agenda**

Prior to the meeting, the facilitator will prepare the agenda. The agenda should be circulated to the attendees at least 48 hours before the meeting in order for them to review the items, assemble any documentation that may be helpful as references, and write down notes, reminders, or questions they may wish to ask.

The agenda should include the start and finish time for the meeting. Drilling down even further, a time limit should be set for each agenda item. Ask one of the attendees to be the timekeeper. The timekeeper will let the facilitator know when time is up. Stick to the time limits. The discussion should stop and the item may need to be put “on hold”, or in the Parking Lot, until the end of the meeting. If an item warrants further discussion and there is time left in the meeting after all the other agenda items have been addressed, then resume the discussion, but not if it means having the meeting run longer than planned.

If others will be presenting information or providing reports, include their names on the agenda. This is a reminder for them to come to the meeting prepared, and lets other attendees know who is responsible for each agenda item.

A good tip for preparing the agenda is to use the previous meeting minutes to review and make sure any action items that needed follow-up are addressed under Old Business. When minutes are written, the font for *ACTION ITEMS:* can be in red, or highlighted. This helps both the facilitator and attendees find these items for further follow-up.

**Obstacles to effective meetings**

Sometime meetings do not run smoothly. The facilitator is responsible for removing the obstacles for running an effective meeting such as lack of an agenda (prepared and/or distributed), failure to clarify to why the meeting is called, or not keeping to the time limits of the agenda items. There are also obstacles that will take more effort on the part of the facilitator to ensure the meeting goes without a hitch.

An example might be key players who have a tendency to come into the meeting late and disrupt the meeting—the facilitator will have to mention that the late-comers can catch up when the minutes are distributed. Schedule meetings with a recurring purpose for the same time and same day if possible so staff knows exactly when the next meeting will occur. Some facilitators have even gone so far as to lock the door at meeting time, and if you are late you just miss the meeting. Others require the late-comer to bring something for the next meeting for the group to share. It can be a helpful tip, a new idea, or even a bag of M & Ms.

During the meeting, there may be two individuals who decide to have their own sidebar discussions. The facilitator may need to stop the group discussion and look toward them. Once their attention is gained, continue with the topic at hand. The facilitator may also need to go over to where they are sitting and stand next to them in order to have them focus on the group discussion. Sidebar
discussions will only delay having a productive meeting, and most other attendees will be grateful to the facilitator for intervening and continuing with the topic of discussion.

Another obstacle is when ping pong discussions lead to a stalemate. Debate goes back and forth between individuals and never goes anywhere. Time once again for the facilitator to step in and move things along. A comment such as, “Does anyone else have another viewpoint to share with the group?” If not, no one does, then let’s move the discussion forward.

One more obstacle for a successful meeting is when decisions are never made. The indecision decision will lead staff to become frustrated, and it re-enforces unproductive behavior. Some type of action will need to be taken in order to avoid this frustrating situation. The facilitator either needs to make the decision for the group based on the best analysis of the pros and cons, and possible outcomes, or the issue will need to be put into the “Parking Lot” until the next meeting for further discussion and data gathering. The facilitator will assign attendees to come up with further information, data or rationale to present at the next meeting. This item should be at the top of the agenda for the next meeting.

Selected group meetings

There are times when a meeting is called and not all staff needs to be present. An example of that type of meeting is one between a manager and his/her direct reports. The Employee Development Meeting provides the opportunity for the manager to conduct a performance review, or to discuss strategies to improve work habits and attitude, or help the staff person grow professionally.

An All Department Meeting involves all staff within a specific department. Reports on the progress of projects, discussion of obstacles or challenges to meeting department goals, or maintaining a team atmosphere are some of the reasons to have department meetings.

Strategic Planning Meetings may occur within or between departments. Their purpose is to work on specific business development goals and strategies. They may include key staff members.

Reviewing key financial reports to direct and inform their management decisions in the business is the key purpose of a financial review meeting. This is a higher level meeting requiring those responsible for the budget to be present.

Spice it up

Meeting time is also a time to develop relationships between staff. It is a time to get to know each other on a more personal level. One good way to interweave the fun and games with the serious portion of the meeting is to schedule the meeting ten minutes earlier than usual (e.g., 8:50 instead of 9:00 am). Design the first ten minutes as social time with staff. You may want to have staff bring some sort of appetizer or dessert to share during this time.
Provide time either before or during your meeting for recognition, rewards, games, good and welfare, or icebreakers. Staff will be more relaxed when it comes time to bear down on tough topics, and may be more energized to participate.

Provide education articles, videos, or CDs for staff to watch prior to the meeting. Staff will be expected to discuss the topic during the meeting. This will open up dialogue among the staff. If staff is receiving the same messaging, in the same format, there will be more consistency in the training process.

To help keep staff’s attention, change some aspect of your meeting about every twenty minutes: presentation style, insert Q&A, use a panel discussion, small group breakouts, videos, mini-breaks, team presentations, exercises, games, quizzes, feedback, or voting. You do not need to do this with every meeting, but it is a good idea to keep staff wondering what they will be doing at the next meeting.

Display inspirational or motivational quotes on note cards and have on table during the meeting, or inserted into individual folders. There are many websites that have lists of quotes relating to almost any topic.

If there are several problems that need to be solved, use flip charts or write boards to have problem-solving statements listed. Written statements such as,” How can we…, or “When this happens, we will need to …” can be located around the room. Allow staff to come up with solutions to the problems and write them down on their sticky notes. Then provide the time for staff to stick their ideas on the areas that apply. Discuss the ideas to use as a guide to develop an action plan based on their suggestions. Staff is more likely to follow-through when the solutions came from their peers rather than being dictated by management.

Finding a new location for the meeting is always welcomed. When weather is nice, hold all or part of the meeting outside. Meeting at a local restaurant is nice, as long as an area is available that your meeting will not be interrupted.

The important thing to remember is that before each meeting decide what type of atmosphere you want to create. Make sure you convey the appropriate message reflecting the agenda items to be discussed and the nature of those items.

**Bottom line**

“In an average day in the US there will be 11 million meetings”. Office managers and upper management need to make sure that the need for a meeting is warranted, the appropriate people are invited to attend, the purpose of the meeting is fully outlined, and the agenda is followed. Staff should leave the meeting with a new understanding or perspective, a shared goal or decision, a specific assignment, and a new feeling of commitment, ownership, or appreciation.

No longer is it acceptable to have a meeting to just have a meeting. With all the demands placed upon staff during the work day, it is vital to utilize every minute to its fullest, not only to keep staff engaged, but also to maximize productivity and profitability for the practice.

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About our Author
Joan Abney is the American Optometric Associations Paraoptometric Resource Center Associate Director. She has written several articles for the AOA News and has facilitated meetings for a variety of groups, both large and small, for many years.

References:


90 days to Success- AAIM Employer’s Association
http://www.charliehawkins.com/articles/MakeMeetingsMoreFun.html

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Anatomy of a Meeting Quiz

To receive two hours of continuing education credit, those taking the quiz must be AOA Associate member paraoptometric and answer 14 of the 20 questions correctly. This exam consists of multiple-choice questions designed to measure the level of understanding of the material covered in the continuing education article “Anatomy of a Meeting.”

If you are renewing a CPO, CPOA or CPOT certification this year, proof of 18 earned credits and your $95 renewal payment will be due to the CPC by November 1. All quizzes submitted by October 1 will be graded and CE verification forms will be emailed to the paraoptometric by October 15 so that the November 1 renewal deadline can be met. Please note that quizzes submitted after October 1 will not be processed in time for you to meet the November 1 deadline.

Quizzes and order forms can be mailed to AOA-PRC, 243 North Lindbergh Blvd., St. Louis, MO 63141; faxed to 314-991-4101; or scanned and emailed to PRC@aoa.org.

This article is worth two hours of continuing education credit from the Commission on Paraoptometric Certification and requires a $20 processing fee. Expiration date: Dec. 31st of the current year

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Select the option that best answers the question.

1. What is another name for the “meeting topics” to be discussed?
   A. Plan of Action
   B. Action Items
   C. Agenda
   D. Topics of Interest

2. Which of the following is NOT a reason to have a meeting:
   A. To inform staff
   B. To educate staff
   C. To congratulate staff
   D. To meet “as scheduled” on calendar

3. According to the article, on average, how many meetings occur each day in the United States?
   A. 1 million
   B. 2 million
   C. 5 million
   D. 11 million

4. Fun and games may be acceptable in what type of meeting setting?
   A. Announcement meeting
   B. Financial meeting
   C. Progress Reporting meeting
   D. Strategic Planning meeting

5. According to the 2007 Microsoft survey, how many hours per week do business professionals spend in meetings?
   A. 6.7 hours
   B. 2.9
   C. 5.6
   D. 6.5

6. According to the article, staff are more likely to accept decisions if:
   A. Their immediate supervisor makes the decision
   B. The owner of the practice makes the decision
   C. Their professional peers make the decision
   D. It is similar to another practice’s decision
7. According to the 2007 Microsoft survey, what percentage of people felt meetings aren’t productive?
   A. 51%
   B. 82%
   C. 69%
   D. 31%

8. How soon before the meeting should the agenda be distributed?
   A. 1 week before
   B. 24 hours before
   C. 48 hours before
   D. The morning before

9. According to the article, what is NOT another way to refer to the “minutes” of the meeting?
   A. Minute notes
   B. Record of the meeting
   C. Written account of the meeting
   D. Secretary’s Notes

10. An Information Meeting can also be called:
    A. Financial Reporting meeting
    B. Progress Report meeting
    C. Strategic Planning meeting
    D. Education Meeting

11. How soon should the minutes of the meeting be distributed after the meeting?
    A. Within one week
    B. Within 24 hours
    C. Within 48 hours
    D. Within two weeks

12. What type of meeting may identify root causes, establish milestones, develop solutions, evaluate options and identify success factors?
    A. Progress Report meeting
    B. Decision Making meeting
    C. Education meeting
    D. Announcement
13. According to the article, what percentage of people admitted to daydreaming during a meeting?
   A. 51%
   B. 28%
   C. 42%
   D. 91%

14. A meeting between a manager and direct reports is called:
   A. Interdepartmental meeting
   B. Strategic Planning meeting
   C. All Department meeting
   D. Employee Development meeting

15. Which of these choices is NOT a task mentioned in the article that can be assigned to a meeting attendee?
   A. Minute keeper
   B. Time keeper
   C. Attendance monitor
   D. Internet user

16. Basecamp, Team Box, and Quickbase are all examples of:
   A. Project management tools
   B. Names given for meeting places in the office
   C. Names of team-building books to read
   D. Financial forecasting tools

17. Who should attend staff meetings?
   A. Mandatory: All staff, at every meeting
   B. Optional: only those who want to attend
   C. Only key staff
   D. It depends on the type of meeting

18. In the article, what percentages of people bring other work into a meeting?
   A. 73%
   B. 10%
   C. 5%
   D. 25%
19. What is recommended for the facilitator to do with agenda items that are undecided and their allotted time has run out for further discussion during the meeting?
   A. To continue discussion until it is finalized, even if it means extending the length of the meeting.
   B. Place it in the “Parking Lot” to discuss later in the meeting after all other agenda items are covered.
   C. Take an immediate vote and go with majority rules.
   D. Schedule a special meeting to discuss in more detail.

20. Which is NOT a key element of a successful meeting?
   A. Side bar discussions
   B. Decision-making
   C. Process management
   D. Participation