

# Planning and Executing an Effective Meeting

---



**Northeastern  
University**

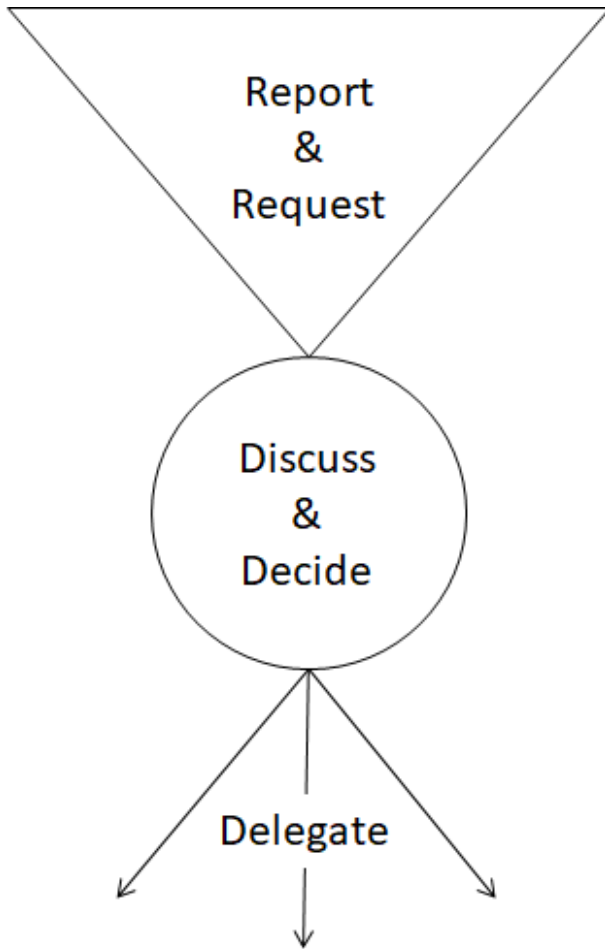
# Agenda

---

- Introductions
- What is a meeting?
- Preparation for a meeting
- During the meeting
- Meeting follow-up
- Takeaways

We encourage you to **participate** and **ask questions** during the presentation!

# Why?



- *This is what I have done*
- *This is what I need help with*
  
- *This is what I think*
- *This is my experience*
- *This is how we will proceed*
  
- *Next steps*
- *Who is responsible*
- *When will it be completed*

# When to *not* to call a meeting

- If the discussion can be carried out through an electronic medium
- When several attendees cannot meet
- When the discussion is a lecture or a one-way information session



**A meeting's purpose is to discuss a topic among a group of people. It must have a **clear objective!****

**The benefit of a meeting is that a group of people are brought together to reach a common goal, **facilitating discussion, collaboration and bringing new perspectives** to a topic!**

# When to call a meeting - examples

| <b>Topic</b>     | <b>Purposes</b>  | <b>Possible Attendees</b>                         |
|------------------|--|---|
| Research problem | <ul style="list-style-type: none"><li>- Discuss the issue</li><li>- Brainstorm possible solutions</li></ul>              | Research advisor and group members                |
| Proposal outline | <ul style="list-style-type: none"><li>- Discuss literature sources research aims</li><li>- Feedback on outline</li></ul> | Research advisor, group members, other professors |
| Class project    | <ul style="list-style-type: none"><li>- Work on project</li><li>- Delegate roles and responsibilities</li></ul>          | Group members, professor, TA                      |

---

# Preparation for a meeting

*The most important and the most work!*

# Roles in a meeting

---

A **Meeting Manager** is the person coordinating and leading a meeting

A **Note-Taker** is the person capturing everything that happens during the meeting

Everyone else are the **attendees**. They are the most important part!

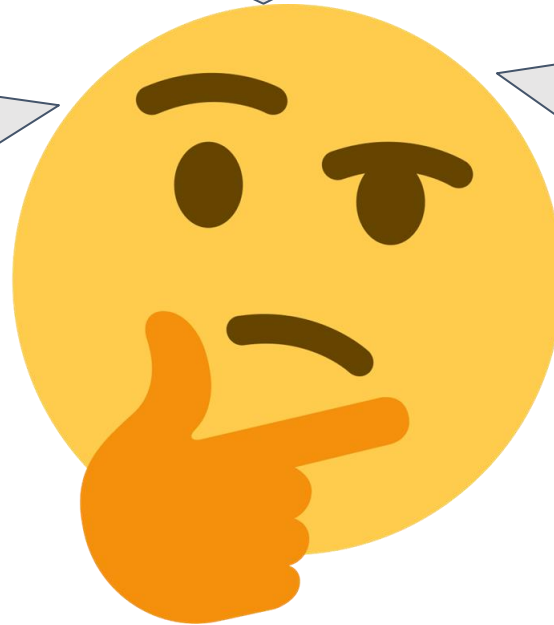


# Pre-Meeting - Questions

*How* should we prepare?

*What* are we going to talk about?

*When* and *where* are we meeting?





# Pre-Meeting: What are we going to talk about?



## **Agenda:** Create an outline of what to discuss during the meeting

- Agenda should divide the meeting into time periods to discuss different aspects of the meeting's purpose
- Factor in time for introductions, logistics, transitions, takeaways, and follow-ups
- Share agenda with attendees
- Prioritize important topics at the beginning of the meeting



# Pre-Meeting: Agenda Template

**Date:** 09/17/2019

**Time and Place:** 1:00 PM - 2:00 PM, Advisor's office

**Purpose:** Discuss research problem with advisor

**Agenda:**

- Explain the issue steps that were taken to advisor (1:05 - 1:15)
- Research/brainstorm possible solutions (1:15 - 1:40)
- Discuss additional resources to solve problem (1:40 - 1:50)
- Recap understanding of the problem, approaches that were discussed, and plan next meeting (1:50 - 2:00)

**Meeting Notes:**

**Action items:**



# Pre-Meeting: How should we prepare?

**Pre-Meeting Action Items:** List of things attendees should do to prepare for meeting discussion  
Items should be ...

- *Specific*
- *Manageable*
- *Related to meeting purpose*



| Topic            | Purposes                          | Possible Attendees                                | Pre-meeting Action items   |
|------------------|-----------------------------------|---|--|
| Proposal outline | Discuss outline and research aims | Research advisor, group members, other professors | - Read proposal requirements (10 min)<br>- Read proposal outline (with focus on research aim 2) (30 min) |

# Pre-Meeting: When and where are we meeting?



## **Time and Place:** Decide where and when to meet

- Schedule with >24 hours notice
- Find an optimal time that works best for all attendees (Doodle)
- Schedule start and end times
- Use a calendar app (google calendar) to create an event and send invitations
- If meeting through videochat (Slack, Skype, BlueJeans), practice and troubleshoot before the meeting



# Pre-Meeting - Recap

*What* are we going to talk about?

Create an **agenda** to divide meeting into time periods to address the meeting's topic.



*How* should we prepare?

Make a brief and manageable **pre-meeting action items** list.



*When* and *where* are we meeting?

Use a **calendar app** to create meeting events and send invites. Troubleshoot if using videochat.



---

# During the meeting

**Everyone is sitting in the room...what now?**

# Roles and Responsibilities during a meeting

- ❖ The **meeting manager** should...
  - Make sure the meeting sticks to the agenda and keep track of time
  - Encourage equal participation
  - Promote collaborative discussion
  - Bring the meeting back in the last five minutes
  - Gauge attendees completion of pre-meeting action items
- ❖ The **note-taker** should...
  - Capture all discussion
- ❖ The **attendees** should...
  - Communicate completion of pre-meeting tasks
  - Actively listen, participate in meeting discussions, and take notes
  - Offer insight, feedback, and unique perspectives



# What is Active Listening?

**Fully concentrating on what is being said: it takes mental effort to fully listen!**

- ❖ Present yourself like your listening
  - Body language
  - Eye contact
  - No laptops or cellphones
- ❖ Connect your statements with the discussion
  - “Going off what Jessica said....”
  - “Although I agree with Carlos on X, I disagree with Y...”
- ❖ Remain neutral and non-judgemental
- ❖ Ask thoughtful follow up-questions

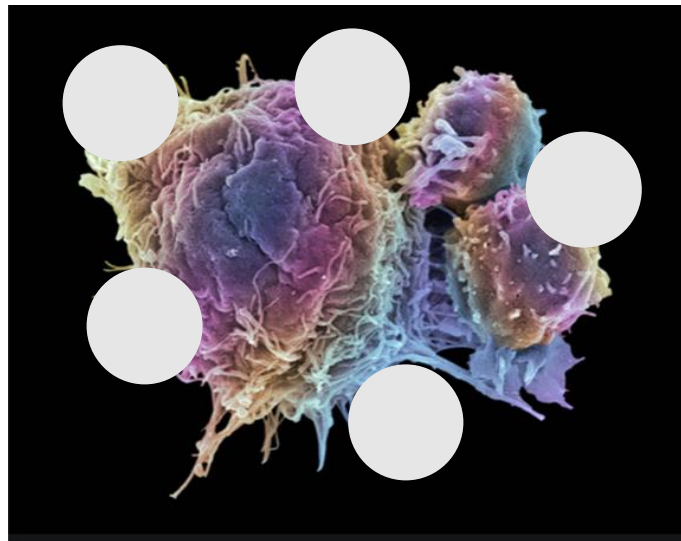
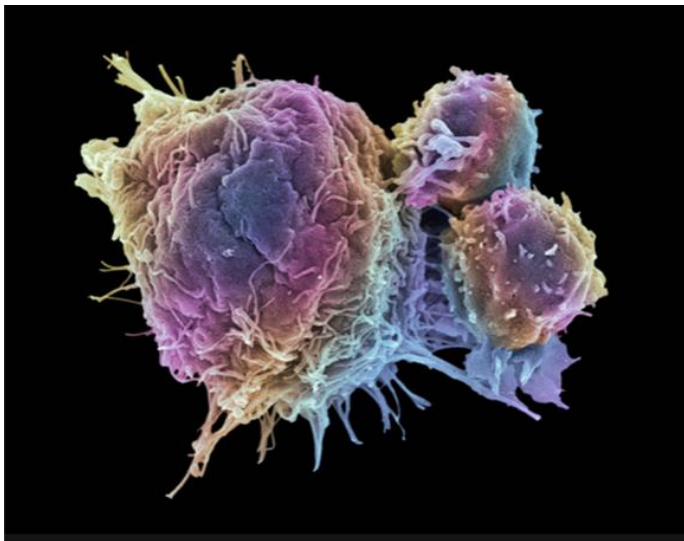
**A better, more  
effective  
meeting!**



# Equal participation is key for a successful meeting

- ❖ A purpose of a meeting is to promote discussion between **all attendees**:  
promote diversity of thought to get the **best outcomes**

## Case Scenario: John's Cell Culture



---

# Meeting follow-up

**The meeting is over...everyone is finished right?**

# Meeting follow-up roles and responsibilities

---

## ❖ Meeting Manager

- Set the date for the next meeting
- Provide attendees with meeting minutes and action items
- Follow-up with attendees on action items

## ❖ Attendees

- Follow-up with any questions or concerns regarding the meeting minutes
- Complete all assigned action items

# Takeaways

The purpose of a meeting is to discuss a topic among a group of peers, using multiple perspectives to accomplish a goal

## ❖ **Before the meeting**

- Set and send an agenda to make the most use of your time
- Get everyone up to speed by sending out action items
- Pick a suitable time and place

## ❖ **During the meeting**

- Use active listening
- Encourage equal participation
- Stick to agenda

## ❖ **Meeting follow-up**

- Send out meeting minutes and action items
- Set tentative time and place for next meeting