

## CHAPTER 16: HOW TO RUN A MORE EFFECTIVE MEETING

CAVEAT: The key question for all meetings: IS THIS MEETING NECESSARY? Will a phone call, letter or office visit be more efficient and productive? If the answer to the first question above is “Yes,” proceed with the rest of this outline. If the answer is “No” or you are wavering, reassess whether your meeting can be postponed, rescheduled or handled in some other fashion. Then, when you are ready for a meeting, come back to this pamphlet.

Now that we’ve considered the most important question for any meeting, the next most important meeting management skill for any bar leader is how to plan, chair and run the session.

In fact, a strong measure of your success as a bar leader or as an attorney within a firm, corporation or organization, will be the quality and product of your meetings.

Although it is not easy to organize groups of people, present and accomplish an agenda, solicit and synthesize opinions and recommendations from others, and coordinate all this efficiently and within a set time, if you are successful in doing so, not only will this enhance your meeting but will also enhance a chair’s professional reputation hone his or her basic legal skills.

Meeting management is more of a skill than an innate talent. It can be broken down into identifiable components. As the following information details, a successful meeting requires planning and preparation. In fact, much like a successful trial or court proceeding, the level of success of most meetings is in direct proportion to the amount of time, thought and planning that precedes the actual event.

Among the items to consider for any meeting:

- A. Planning and timetables
- B. Audience profile
- C. Agenda
- D. Facilitates profile
- E. Objectives
- F. Opening statements
- G. Introductions
- H. Record keeping
- I. People management
- J. Running discussions
- K. Voting
- L. Closing statements
- M. Follow-up
- N. How to improve

A. Planning

Once the need for a meeting has been established it is up to the chairperson to plan or at least supervise the planning. The most elemental items are to set a date, time and place for the

meeting. Equally important is to be clear as to the purpose, or even title of the meeting. When meeting announcements are sent out, a clear statement of purpose and/or a catchy title can focus attention on the objectives and can help increase attendance.

The original planning period is also time to consider details such as the meeting room and necessary support facilities. Other important details include catering and food needs, hotels and transportation requirements. A timeline and pre-meeting deadlines should be established. Just as the successful meeting should run efficiently and fairly, these deadlines should be well thought out and enforced.

## B. Audience Profile

Before setting the agenda or deciding on objectives and prepared statements, take the time to profile your audience—whether it’s a meeting of three or four people in your firm or a group of 150 in a community meeting. Consider the audience as a group and also focus on your personal objectives.

Questions to consider:

1. Who are they, *i.e.* age, sex, profession, income, attitude?
2. What do they know about the subject and what’s their level of interest?
3. What is their relationship to you?
4. What factors do you share in common with the attendees, *i.e.*, occasion, affiliation, profession, skills, personal/professional goals?
5. What is your purpose, *i.e.*, inform, discuss, solve problems, decide, persuade, agree on an action plan, sell?

The audience profile is critically important. While it is important to accomplish the agenda and basic tasks of the meetings, the Who, What, Why, When and How issues, keep in mind that most people who attend a meeting also have personal questions: So What? Who Cares? What’s in it for me?

## C. Agenda

All meetings require an agenda, at least for you the chairperson. Agendas need not be set in stone, but without at least a loose structure any meeting will wander. Depending on the meeting, agendas become items for discussion and even contention.

If your meeting requires consensus on the agenda, consider agreement on the agenda before the meeting starts. This may mean preliminary phone calls, memos or letters to solicit items, opinions and pre-meeting materials.

In addition to the list of items to be covered, the agenda may include ground rules for the meeting, such as the length of time for opening statements and discussion, as well as rules for voting and submission of materials.

Depending on the meeting, you should provide a written agenda for all attendees, a display of the agenda on a flip chart or slide, or at least an oral review before the meeting starts. Reviewing and achieving agreement on the agenda is as important as any other aspect of meeting management. When discussion begins to take too long or deviates from topics, it is the agreed upon agenda that provides the legitimacy or power to move on, not the whims of the chairperson.

If you hand out an agenda at the meeting, never provide a minute-by-minute time schedule, lest you have a group of people constantly looking at their wrist watches.

One rule that cannot be overemphasized, if you can discuss and take action on all of your agenda items, as well as start and conclude the meeting on time, 95 times out of 100, you have led a successful meeting.

#### D. Facilities Profile

A smooth running meeting depends on coordinating all the elements in your presentation “theater.” A dry run using all the required equipment will make the technology as transparent as possible to the attendees.

Items for you to consider:

1. Size of room—too large or too small for audience
2. Seating arrangements—table, theater style, chevron
3. Lighting—even with visual aids, make sure the speaker is always well lit
4. “Visual aids—overhead projectors, flip charts, slide projectors, videotape players and monitor (with extra bulbs)
5. Lectern and microphones
6. Catering—water pitchers and cups

A final word of caution: **KNOW WHERE FIRE EXITS ARE.** If you are chairing a meeting, you are the leader, and the attendees will look to you for help in case of an emergency. Thus, you should always be prepared.

#### E. Objectives

Spend some time defining your personal objectives for the meeting. These may often be the same as those of the attendees. However, if you first clarify these, it will become easier to identify which voice you speak with during the meeting—that of individual member of a committee or organization, a party in interest, or neutral chairperson.

#### F. Opening Statement

The entire tone of a meeting can be set by a strong opening statement. It must be short and to the point. Think of a good, effective opening statement you have heard from a political debate. Set your time limit and stick to it.

The opening statement is the “tell’em-what-you’re-gonna tell’em” part of: “Tell’em-what you’re gonna-tell’em; tell’em; tell’em-what-you-told’em.” An opening statement should always include a welcome to the meeting, and purposeful thank you. The statement should include a review of the agenda, requests for changes to the agenda, statement of ground rules and expected closing time. Depending on the meeting, the opening statement may have a direct or subtle message from you as to your personal expectations for the session.

#### G. Introductions

An often overlooked matter of protocol is to make sure all key members know each other. In a small group, take the time to introduce participants, or more effectively, allow each participant to introduce him or herself, with perhaps a few words on expectations for the meeting. In a larger meeting, take the time to introduce the people who will be presenting.

#### H. Record Keeping

Decide in advance the kind of records that must be kept for the meeting. The chair should almost never be responsible for taking the official notes of the proceeding. You can ask for a volunteer to take the minutes. However, it is usually more effective if you pre-arrange for the minute taker or recording secretary. Also, decide whether you want verbatim notes from the meeting. If so, make sure you have a tape recorder.

A separate person from the chair and minutes keeper should also be appointed to write items on a blackboard or flip chart. The cardinal rule for list creating and brainstorming sessions is that all suggestions, no matter how outlandish, should be recorded. They can later be dismissed, but don’t cut off suggestions unilaterally. The pages from the flip chart may also be important to save and/or taped to the wall as they are filled.

While the chair should not take the actual notes, the chair should make sure the minutes are distributed in a timely fashion after the meeting. Make sure you review the minutes before they are sent out.

#### I. People Management

Smaller meetings often display common personality types. Recognizing and effectively dealing with these personality types at meetings is the subject of several books.

\* *The Silent Type*: When you need a reaction, don’t intimidate the person by suddenly calling on him or her. Try the collective approach by soliciting opinions from the whole group and placing the silent one somewhere in the middle.

\* *The Objectivist*: Don’t take this person on during the meeting. Often the best approach is to meet with this person prior to a meeting. Present your ideas or objectives and gain assent prior to the actual session. If the objectivist tries to dominate or take over a meeting, do not take this personally or show your irritation. Offer to consider certain points and revert to the agreed upon agenda to get a discussion back on track.

\* *The Monopolist*: This personality is like the objectionist, but not as negative. Rather this type of person just likes to talk and contribute. Enforcing time limits and making sure you solicit the opinions of others will help, *i.e.*, “Henry, I’ll get back to you in a moment. But let me first get the views of some other people who are here.”

\* *The Inadequate*: Allow this person to feel more adequate and powerful. Often allowing this person to take on small, easy-to-accomplish tasks will make them more productive at future meetings.

\* *The Idealist*: This person can be angry, obstructionist and unwilling to compromise, or simply overly zealous. An effective leader will try to find a common ground without agreeing to the position statement of the Idealist, *i.e.*, “Yes, the XYZ company does have some environmental concerns....”

\**Interruptions*: These are not people, but things done by people. A slight interruption, such as someone walking into the room or a comment or two, should be ignored. Silence works quite well for a slightly longer interruption such as a side conversation or persistent coughing. When the talking continues or the waiters continue to clear tables while someone is speaking, take control and ask for cooperation. If you are ever handed a note while you are speaking, finish your thoughts, take a look at the note and let the attendees know if it’s for you or who left their car lights on.

Whether you want to or not, the other members of a committee or attendees at a meeting look to you to control all aspects of the meeting, including the people who attend.

#### J. Running the Discussion

Pre-set ground rules are very important. Let the members know how long the discussion should go and how long each person should speak. If Barbara Walters could cut off Ronald Reagan and Walter Mondale in their television debates, you should be able to enforce time limits for your discussions.

If appropriate, summarize or clarify comments during a discussion. Discussion time is generally time for the leader to be a moderator and not a key participant. You should recognize when to call for a vote and be wary not rush to a judgment when the issue is not ready to be called. If the agenda called for a decision to be made and it is clear that it cannot be made at the current meeting, the leader should at least make sure there is agreement on the next steps.

#### K. Voting

The chairperson is responsible for insuring that the decision making process is fair, efficient and accurate.

Again, preparation before the meeting will make any vote taking that much easier. Your first task is to check the organization by-laws or constitution for proscribed notice and voting

requirements. Other decisions include whether voting should be by secret ballot, voice vote or a show of hands; whether the result should be by majority, two-thirds or unanimous consent. Voice votes can generally be conducted by the chair, but ask someone to confirm your findings. A show of hands ballot should have at least two designated counters. When you know there will be a secret ballot in advance, also decide on a method to distribute, collect and count the vote. Ballots should be re-checked, and if necessary, retained in a secure location.

#### L. Closing Statements

Research on meetings and audience retention of what has transpired indicates that less than 50% of the discussion is remembered more than a day later. However, the last things said are remembered the longest. Therefore, your closing statements are extremely important.

Much of your closing statement can be prepared in advance. The statement can include:

- 1 A thank you to all who attended and special thank you's to people who have accomplished tasks, presented information and who have taken on responsibilities.
- 2 A recap of important action items and decisions so that all attendees leave with a sense of accomplishment and agreement.
- 3 A clear statement of when and where the next meeting or event is to be held, or a statement of how people will be informed.
- 4 Your own personal observations, if appropriate.

If people are beginning to leave before the meeting is over, it is up to the chair to take control. Often a statement of how much time is left will get people to delay their departure. It is important not to let early departures distract from the rest of the meeting or make those who remain feel like they are being kept after school

If you have accomplished your agenda and have finished on or before your scheduled time, you can generally consider your meeting a success. Participants will consider that their time has been well spent and they will be more willing to attend the next meeting.

#### M. Follow-up

While you may not have assumed the responsibility for post-meeting activity, minute writing or action items, it is the chairperson's responsibility to check and make sure all these commitments have been fulfilled. There is a great tendency for people to make promises during a meeting and then delay or even fail to fulfill their promises. The chair can insure the success of the post-meeting follow-up with polite phone calls and notes. If this gentle prodding doesn't work, don't be afraid to use the legitimacy of the chairperson's position to encourage the activity to be completed. As chairperson, you should always review the minutes before they are sent out to the attendees at a meeting.

## N. A Final Note – How to Improve

Chairing a meeting is a time consuming responsibility. It takes planning, thought and organization. If you volunteer or are asked to run a meeting, take the responsibility seriously.

The best way to improve your skills is the same way one gets to Carnegie Hall: Practice, Practice, Practice. Sometimes the only way to practice is trial and error at your meetings. But seek other less stressful or less consequential situations. A lawyer who held up well under very rigorous questioning from the Justices of the United States Supreme Court, was asked, “How did you do so well? They interrupted every few seconds, and yet you handled the questions and still managed to score your points.” The lawyer responded, “This was the first time the Justices heard my argument. But my staff heard it 400 times before today.”

Public speaking or presentation courses can help you improve writing and delivery skills including: opening statements, introductions, running discussions, calling for a vote and handling equipment. Make sure that you find a course that provides videotape segments of your performance and feedback from professionals. If you don’t have the time or funds for a course, use a Dictaphone, audio tape recorder or videotape recorder and practice by yourself. At the very least, find a friend or family member to listen to you rehearse out loud.

The mechanical parts of chairing a meeting require time and rehearsal. Take the time to inspect the meeting room before the date of the session. Talk with the facilities personnel and ask how the lights, sound system and equipment work. Arrive early on the date of the meeting for a final systems check.

Don’t be afraid to ask advice of those whose skills you respect and admire. Occasionally, people will be too busy to respond. But most people are flattered when you compliment them on their skills and ask for tips and suggestions.

Be aware that it’s appropriate to be a bit nervous before a meeting starts, particularly when it’s important or the first meeting you’re chairing. Take a few moments to relax yourself.. One of the best methods for relaxation is to take slow deep breaths by breathing in through your nose and out through your mouth. It’s remarkable how well this may calm your nerves and focus your attention on the task at hand. When you step to the lectern to call the meeting to order, smile and do your best.

Remember the caveat: IS THIS MEETING NECESSARY? If the answer is yes, make every attempt to start and end on time, Keep the meeting moving and work hard to accomplish the agenda items. Successful meetings can contribute to your success as a bar leader.

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