

## Section two:

# Prepare for meetings

This section will help you to set clear objectives, write an agenda, prepare the venue and put the relevant materials in place.

# Step one: Set a clear objective

Firstly, decide whether a meeting is appropriate. Think about your purpose and who you need to be there. Ask yourself:

- Is this meeting really necessary?

Once you have decided to hold a meeting, you need to ensure its purpose is clear. Answering these questions can help you decide:

- Why am I having this meeting?
- Is there a more suitable option such as a phone call, video conference, letter memo or email?
- What is my ideal outcome?

## A Meeting objectives

Think of a meeting you need to arrange. Work towards its objective using the statements on the sticky note below. Some of the words below might help you.



Justify



Educate



Produce



Decide



Network



Promote



Celebrate



## Step two: Decide who's going

**A** Now you know your meeting's objective you need to decide who to invite. Consider these points and make notes in the spaces provided:

- Will the potential attendee gain any benefits from the outcome of the meeting?
- How can they contribute to the meeting's objectives?
- Who might be expected to attend?
- Are they available? What are their schedules and commitments? Key attendees must be available to attend, so if they're not, postpone the meeting rather than hold it without them.
- How are you going to keep a record of the meeting? Choose someone to take the role of note-taker as this will leave you, the chair, free to manage the process of the meeting.

If the meeting is important to get work done or decisions made, attendance may be essential. At other meetings, however, attendance may be voluntary such as for information sharing exercises, for example.

Who will gain benefits from this topic?

What contribution can they make?

Which visual aids do I need?



## Step three: Put the relevant materials and equipment in place

Once you've decided who's going, you need to set up procedures to control the process, such as a timed agenda.

- Material should be circulated at least two days in advance to give attendees time to think and prepare, especially the more reflective people. They may also want to consult with others who may be affected by the topics discussed.
- Include any up-to-date supporting information (perhaps the minutes from the last meeting, for example). Gather any information you need from relevant people as early as possible.
- Will you need to book any refreshments in advance?
- Consider whether you need any visual aids such as flipcharts, laptops or projectors and book them when you book the room. Make sure all facilities and materials are accessible for all attendees.

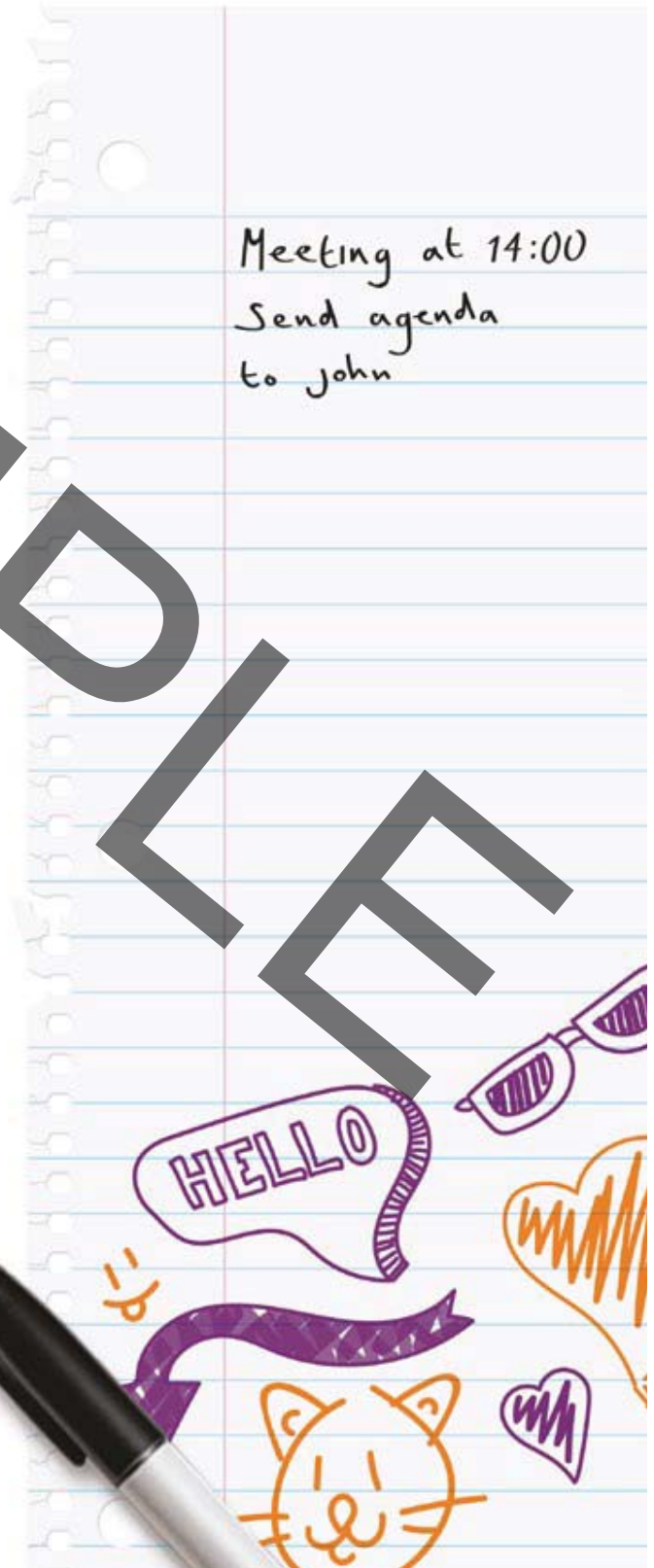


## Step four: Write your agenda

Your meeting's agenda should include:

- The date
- The start and finish times
- The location
- A review of actions decided at the last meeting if there were any relevant ones to follow-up
- The objectives of this meeting
- Topics to be discussed in a logical or priority order (allow realistic time for each option)
- An item called Any Other Business (AOB) to include important or urgent items that may have arisen since the agenda was distributed

Think about how you intend to follow up new actions.



## Write your agenda

Below are two agendas. Agenda two is the preferred version as it provides people with more detail.

### Agenda 1

Team Meeting

28 April - 14:30

Meeting room B

1. Minutes of last meeting.
2. New service plan.

3. Office support.
4. Office refurbishment.
5. Computers.
6. Any other business.

### Agenda 2

Team Meeting

28 April - 14:30-16:30

Meeting room B

The objectives are to:

1. update team on current workload
2. gain feedback on issues and training needs

Order of events:

1. Minutes of last meeting: update on action points from those responsible.
2. Items in minutes not dealt with

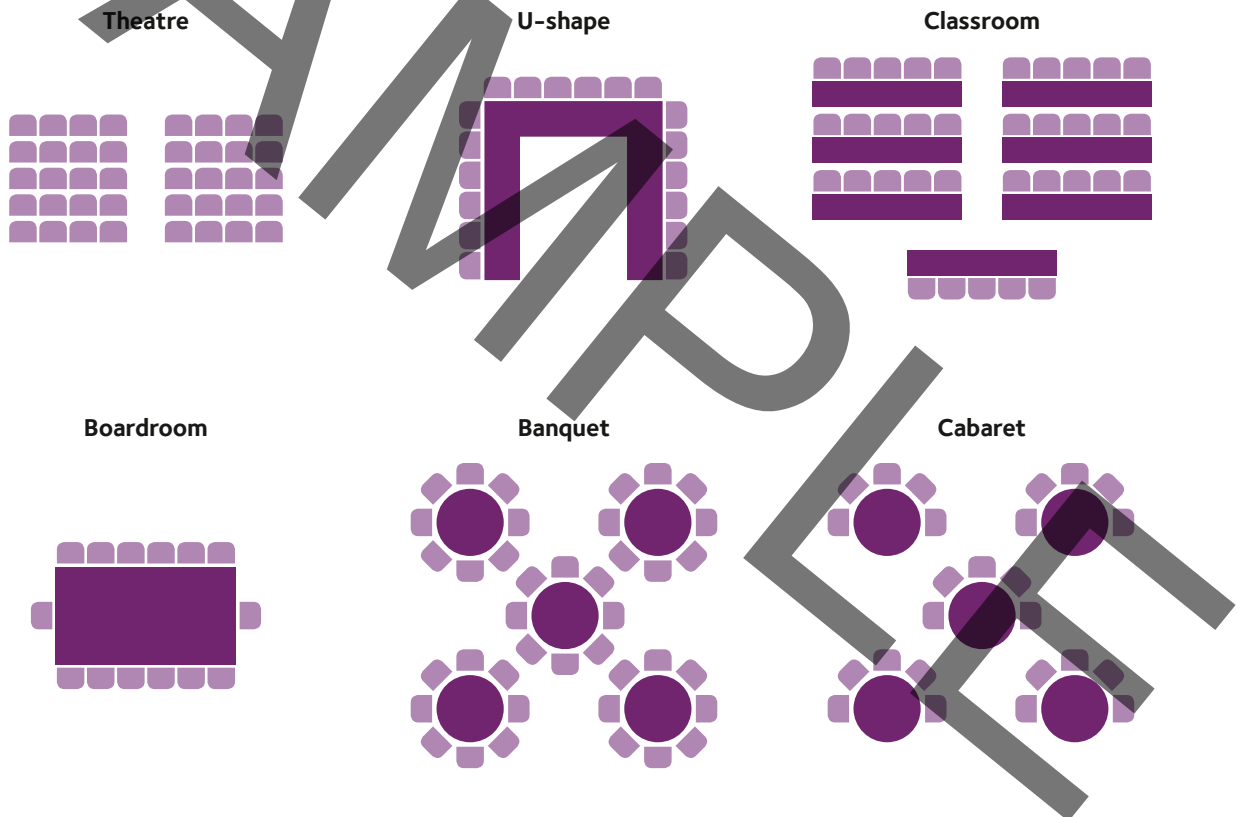
3. Any other business: later in meeting. scheduling items.
4. New service plan: date of launch and new staff.
5. Office support: discuss current problems and need.
6. Office refurbishment: report from project working group.
7. Computers: information on forthcoming update.
8. Training needs.
9. Date of next meeting.

## Step five: Prepare the venue

Seating can be crucial in determining how well the meeting flows and how people are able to contribute.

Seating around small tables in an informal room, for example, will encourage a more direct and friendly discussion but if people are sitting in order of seniority around a large board room table the discussion will be more formal.

Think carefully about what you want to achieve and match the location and seating to the purpose and desired degree of formality. For example, would U-shaped, classic board room style, square, circle or clusters of seats help your purpose?



### Checklist

Before each meeting, be sure you have done the following:

- Set a clear objective
- Decided who's going
- Put the relevant materials and equipment in place
- Written your agenda – for circulation
- Prepared the venue

## A Preparing for a meeting

Identify a meeting that you need to prepare to lead, either on your own or on someone else's behalf. Respond to the questions below:

What type of meeting is it?

Briefly describe any relevant background to the meeting:

What is the purpose of the meeting?

What is the meeting intended to achieve?

Date:

Location:

Agenda:

Documentation:

Date of distribution:

Information that attendees should read in advance:

Required attendees:

Expected attendees:

Equipment and refreshments:

