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Running Effective Meetings

for
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Make your meetings
better before they happen

Optimize your efforts during
your meetings

Enhance performance
after your meetings

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Running Effective Meetings

by Joseph A. Allen and Karin M. Reed

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dummies
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Introduction

“Yay! Another meeting!”

We would bet big money that these words have never been said, except perhaps by Joe who has been studying meetings for decades. In fact, meetings have been maligned from practically the dawn of meetings themselves. But meetings, on their own, aren't bad. We would suggest it's the meeting leaders who are bad at running them (and the meeting attendees who are bad at contributing within them) ... and that's why we are thrilled you are reading this book.

Whether you've never run a meeting before in your career or curse the hours you've spent running what you'd objectively consider rotten meetings, think of this book as your ultimate guide. You will discover all you need to know about running an effective meeting, one where you actually get stuff done, move business forward, and perhaps even have fun along the way.

But even if you don't run many meetings, you'll still find value in giving this book a read. There are nuggets of insight throughout the book on how you can be a better meeting attendee and support your meeting leaders in their efforts to make their sessions worthwhile. Heck, you might even find yourself coaching up your supervisor or boss on better meeting management. That would make our day and likely your future in meetings just a little bit brighter!

About This Book

If you are a manager, much of your workday will be devoted to meetings. Some you will lead and some you

may just attend. We focus in this book on the former. We've loosely organized the book in sequential order, sharing best practices for what to do before, during, and after a meeting.

Some of what we include may not be news to you. In fact, many meeting best practices are common sense but uncommonly practiced. Even if you read something that seems elementary to you, pause to put it into context. You may know that "starting on time" is a good idea, but do you really hold yourself to that standard? Everything included in this book is designed to build a strong foundation for a meeting that is both productive and satisfying for all involved.

To make the content more accessible, we've divided it into five parts:

- » **[Part 1](#): Understanding the Role of Meetings in Business.** This is a great place to start to get a solid overview of how meetings are incorporated and conducted across the corporate landscape. We also include some specific considerations related to video use and global participants.
- » **[Part 2](#): Setting Up for Success — What to do Before a Meeting.** How effective your meeting will be is often dictated before you even enter the meeting room, whether it's a physical or virtual one. In this part, we talk about the critical steps you should take prior to your meeting.
- » **[Part 3](#): Facilitating an Effective Meeting — What to do During a Meeting.** It's showtime! This part is devoted to ensuring you orchestrate a meeting that accomplishes its goal. We focus primarily on promoting full participation and tamping down bad meeting

behavior while spending some time on best practices in delivering presentations within a meeting.

- » **Part 4: Making a Meeting Worthwhile — What to do After a Meeting.** Don't let all of your hard work be for naught. What you do once the official meeting adjourns is just as important as what you do prior to and during your session. In this part, we lay out the actions you need to take once everyone has left the meeting room.
- » **Part 5: The Part of Tens.** Looking for some quick inspiration? The chapters in this part are our top ten lists offering you specific strategies for amping up participation, jump-starting a stalled dialogue, and rethinking where a meeting should take place.

Foolish Assumptions

In this book, we assume that you fall into one of two categories:

- » You are a new manager with either no or very limited experience in leading a meeting.
- » You are a not-so-new manager who is dissatisfied with how you're leading your meetings.

Either way, you will find a lot of valuable information that will help you to either create good habits from the get-go or break bad habits and replace them with better ones.

We also assume that you are relatively tech savvy or are willing to learn how to incorporate technology into your meetings. Given the proliferation of virtual and hybrid meetings, you will have at least some familiarity with online meeting platforms.

Icons Used in This Book

Throughout this book, icons in the margins highlight certain types of valuable information that call out for your attention. Here are the icons you'll encounter and a brief description of each:



TIP

The Tip icon marks tips and shortcuts that you can use to make running your meetings easier. They're very practical in nature and include specific actions we recommend you take to improve the meeting experience for you and your attendees.



REMEMBER

Remember icons mark the information that's especially important to know. To siphon off the most important information in each chapter, just skim through these icons.



**TECHNICAL
STUFF**

The Technical Stuff icon marks information of a highly technical nature that you can normally skip over. However, if you are looking for the "why" behind the "what" for some of the best practices we mention, feel free to read on. Joe, as a meeting scientist, would be especially delighted when reading text marked with this icon.



WARNING The Warning icon tells you to watch out! It marks important information that may save you headaches, when you are plotting out your strategy for planning, running, and following up on your meetings.

Beyond the Book

In addition to the abundance of information and guidance related to meetings that we provide in this book, you get access to even more help and information online at Dummies.com. Check out this book's online Cheat Sheet. Just go to www.dummies.com and search for "Running Effective Meetings For Dummies Cheat Sheet."

Where to Go from Here

If you are new to this meeting leader thing, you may want to flip open the front cover and keep flipping the pages until you reach the back cover, reading all of the chapters in the sequence shown. That works!

If you are simply looking to improve your current meeting process, you may only need a bit more insight here, a bit more intel there. The choice is yours. For example, if you're interested in making the discussion in your meetings more effective and enjoyable, flick through to [Chapter 3](#). Or if differences in people's culture and how it impacts their behavior in meetings is something you've always wanted to find out more about (but were afraid to ask), check out [Chapter 6](#). And if you're looking for a general overview to explain why running meetings well is important (whether for yourself

or to explain to others), turn the page and start with [Chapter 1](#).

If you want to devour the entire thing in chronological order, go for it. If you want to hop in and out of chapters, based upon what you need to know, that works too. Each section stands alone, but we will let you know if you are reading a section on a certain topic which is discussed elsewhere in the book.

Meetings matter. Run them poorly, and they gum up the works of any business. Run them well and they'll be like a well-oiled machine that keeps business chugging along. Time to start the journey!

Part 1

Understanding the Role of Meeting in Business

IN THIS PART ...

You might be asking yourself, “Why do meetings matter?”

It’s a fair question, but we are going to assume that if you bought this book, you have more than just an inkling that your ability to run them well may be a key component to your success. Considering how much of your time as a manager is spent conducting meetings, you’re spot on! However, knowing how to facilitate and manage a meeting is a lot more complex than you might imagine.

In this part, you will discover why meetings are so important to business. You will learn about the full meeting continuum, things to do before, during, and after a meeting. We’ll also explain the key decision points around how to meet, including face-to-face, virtual, and hybrid.

Chapter 1

Making Meetings More Effective

IN THIS CHAPTER

- » Figuring out why meetings matter
 - » Defining the kind of meeting featured in this book
 - » Describing the seismic shifts in the way we now meet
-

So be honest with us: Were you given this book as a gag gift by your team who thought it would be hilarious to give you a book about running *effective* meetings ... for *dummies*?

When we first heard the proposed title, we thought it might lend itself to that kind of purchase. No worries, regardless of how this book made its way to you, we're glad you're here, and we think you will be too. Why? Because when it comes to running meetings well, there's a lot to learn whether you are a newbie to the task or have been leading meetings for decades.

Some meetings are well run and result in employees and team members being inspired, encouraged, and ready to perform at a high level. Many meetings are not run so well. They suffer from a lack of focus, a constraining of participation, and result in people leaving confused, misdirected, or simply just annoyed.

Our promise to you is that following the guidance in this book will make the meetings you lead be well run. The tips and tricks, the best practices, and the prioritized processes contained herein are tried and true. In other words, they are science-based practice. What does that mean?



REMEMBER *Science-based practice* means that every recommendation we make and tip we give you has emerged from the scientific community that studies workplace meetings. In fact, the vast majority of these recommendations come directly from the science of meetings that Joe studies and the practice of meetings that Karin leads. You can proceed to implement any of the things we suggest with complete confidence that they will indeed change your meeting experiences for the better.

Gone are the days where you lead a meeting and leave it feeling like you didn't accomplish the goals you had for the meeting. Follow the steps in this book and you can enjoy countless good meetings, and get this ... even see some free time open up on your calendar. How is this possible?



REMEMBER Our data tells us one bad meeting results in three more meetings, meetings that are needed to clean up the mess of the original one. Think about it this way, if you have fewer bad meetings, you'll have fewer meetings overall!

And if that's not reason enough to read this book, let's give you just one more reason. You don't have to run

meetings to use many of the tips and recommendations provided in this book. In fact, a good meeting attendee has a powerful influence on the effectiveness of the meetings they attend. Sure, you may not be able to replace the meeting leader, but you can help replace the bad behavior that sometimes permeates the meetings you attend. (If you want more detail, check out [Chapter 14](#) that provides ways to stifle those bad behaviors.)

There's indeed hope for a brighter meeting future and we're here to help you achieve it.

Understanding Why Meetings are Important

This is the ages-old question that Joe tries to answer in every paper or book he writes, "Who cares?". More specifically, why should we care about meetings? We all have them. They are kind of "meh," and they do essentially all that we need them to do, albeit not as well as we might generally like.

Well, let's review a few facts:

- » According to some amazing survey work by Elise Keith at Lucid Meetings, there were at least 55 million meetings per day in the United States in 2015. But that was before COVID-19 hit, and there was an explosion in the number of meetings that we were having. In fact, it's estimated that the number of meetings increased by 252 percent during the pandemic and have not come back down. So, doing a little math here, that means we're at somewhere around 139 million meetings a day. That's a lot of meetings.

- » Fifty-one percent of meetings in the U.S. are rated as poor. Not so-so. Not okay. Poor! That means more than half of those 139 million meetings are just plain lousy. They're awful, uninspiring, time-sucks that drain the energy and life out of people. It's no wonder that we commiserate at the water cooler after a long day of meetings (or more likely the pub on Fridays).
- » In larger organizations, managers spend 75 percent of their time on meeting-related activities. That is, the vast majority of their time is spent preparing for, attending, and leading meetings. If you're a manager in a larger organization, you're probably yelling at the book right now. We hear you and we feel your pain! We've lived that painful narrative ourselves, and that's why the science and practice of meetings is coming together to give you this book.



REMEMBER Meetings are everywhere. They fill up our calendars. But, they do not have to be terrible. They can and should be better and we can help!

Now, just because we do something a lot doesn't make it important. So, we repeat, "Who cares?" Well, where are all the important business decisions made? How are scarce resources in an organization divided up? Where do we both bond with our colleagues and lend them support at the same time? Where are strategies for the future born? Where are products moved from idea to reality? We could go on, but the answer is meetings. For more on the many purposes of meetings, flick through to [Chapter 7](#).

Meetings are a highly customizable and adaptable collaboration environment where three or more people

come together to discuss something. They are typically more formal than a quick chat, but less formal than an organized lecture or convention. Meetings are where people make many of the decisions that manage organizational life and are also where communities, cultures, and social connections are initiated, maintained, and sometimes ended.

In sum, meetings are everywhere and they can do many things. But, the people in them are just people. We all make mistakes. We all have flaws. And we carry those issues with us into our collaborative environments. Good meeting practices are intuitive and can help us collaborate effectively regardless of our mistakes, flaws, and issues. But, we have to choose to do follow them.

Discovering Why Better Meetings Benefit Everyone

We all have a ton of meetings and they can do a lot of good things for us, but will it really benefit you if you put more effort into each one? Yes! And there's really good scientific evidence to back up this emphatic claim.



TECHNICAL
STUFF

In 2008, Joe started working with his mentor Steven Rogelberg on a study looking at how meetings might relate to job satisfaction. Specifically, we were trying to provide evidence that human resources managers and others should care about meetings, how they are run, and how they impact employees. Steven's idea around this was to see if meeting satisfaction related to job satisfaction. In the first study, we decided to statistically control for the facets of job satisfaction. These include satisfaction with one's pay, coworkers, the work itself, promotion opportunities, and the boss. Once you account for those five things, there's not a whole lot left that could relate to job satisfaction. In fact, what are meetings? Gatherings of coworkers and often the boss. Our hope was that meetings are more than just being around coworkers and the boss, but something more core to employees' ability to do their work. To our surprise and wonder, meeting satisfaction still related to job satisfaction even after we accounted for all five of these things! That meant that there's something interesting about meetings that's more than just wrapped up in our relationship with and satisfaction with our coworkers and bosses.

This led to a series of studies looking at the positive impact and negative impact of meetings, including how meetings can help or hurt overall employee health and well-being. Here's what we concluded:

- » Good meetings positively relate to overall employee satisfaction with their job, their level of employee engagement, and their performance on the job. In

other words, good meetings make for happier, harder working employees that actually get the job done.

- » Bad meetings lead to more dissatisfaction, disengagement, and lower job performance. However, it doesn't stop there. Bad meetings also relate to employee stress, reductions in overall health, and increases in burnout. In other words, bad meetings actually make people less well and are a major driver of burnout and turnover in organizations.

And maybe we shouldn't be all that surprised. Given how prevalent they are, for a lot of people, meetings are their work. We know from a long history of workforce research that when people are happy in their jobs, they are generally happy with life. If your meetings are miserable and you have a lot of meetings, you probably aren't that happy with your job. To find out more on how to evaluate your meetings, check out [Chapter 16](#).



REMEMBER Good meetings lead to good outcomes. Bad meetings lead to bad outcomes. And we are all about helping you and everyone else have more good meetings, and fewer bad meetings.

Knowing What Kind of Meetings this Book is About

Given the range and flexibility of meetings, it may come as no surprise that there are a number of different meeting types:

- » There are small meetings among team members.
- » There are large meetings, such as conferences and conventions where hundreds of people come together.
- » There are even medium-sized meetings such as board meetings or stand-up meetings for a larger workforce in a facility.

But that's all just about size.

You could also put meetings into general categories or meeting types such as:

- » the staff meeting
- » the safety meeting
- » the committee meeting
- » the stand-up meeting
- » the debrief meeting

Meetings can also have a variety of purposes including, but not limited to:

- » Strategy development
- » Product development
- » Human resources decisions

- » Project meetings
- » Agile meetings
- » Meetings to plan other meetings

We could go on and on with these bullet lists, but we think you get the gist.

Joe likes to remind people that humans started holding meetings with each other as soon as there were enough people to call for one. That's a long time ago. Our meeting purposes now are a bit different than they probably were then. Instead of decisions about where to hunt for our next meal, we have meetings about where we want to get lunch for our new client. Wait, that sounds awfully similar!



REMEMBER Regardless, this book could not be about every single potential meeting type. That would be absurd and would require a whole series of *For Dummies* books (and a new set of bookshelves for you), rather than one book. So, our focus in this particular book is on the small group or team meeting. It just so happens to be the most common form of meeting that fills up our calendars to no end. So, it's a good place to start.

The small group meeting

The *small group meeting* is a gathering of three to around seven individuals as a group to discuss a matter. Yes, two people can have a meeting, but it takes three to be a group. Folks in small group meetings can be from the same team within an organization or they can be from different departments or even different organizations. That is, the meeting can be with *internal*

stakeholders (people in the organization) or *external stake holders* (people outside the organization).

The key attribute is that these are relatively small gatherings where a variety of topics may be discussed and decisions are often made. They essentially follow Jeff Bezos' (Amazon CEO) two pizza rule, which states that a meeting shouldn't contain more people than could be fed by two large pizzas. That pretty much caps out small group meetings at around five to seven people, give or take. We talk about this more in [Chapter 2](#).



REMEMBER The small group meeting is the most common form of meeting from a size perspective, and the kind of meeting that represents the vast majority of meetings on most people's calendars.

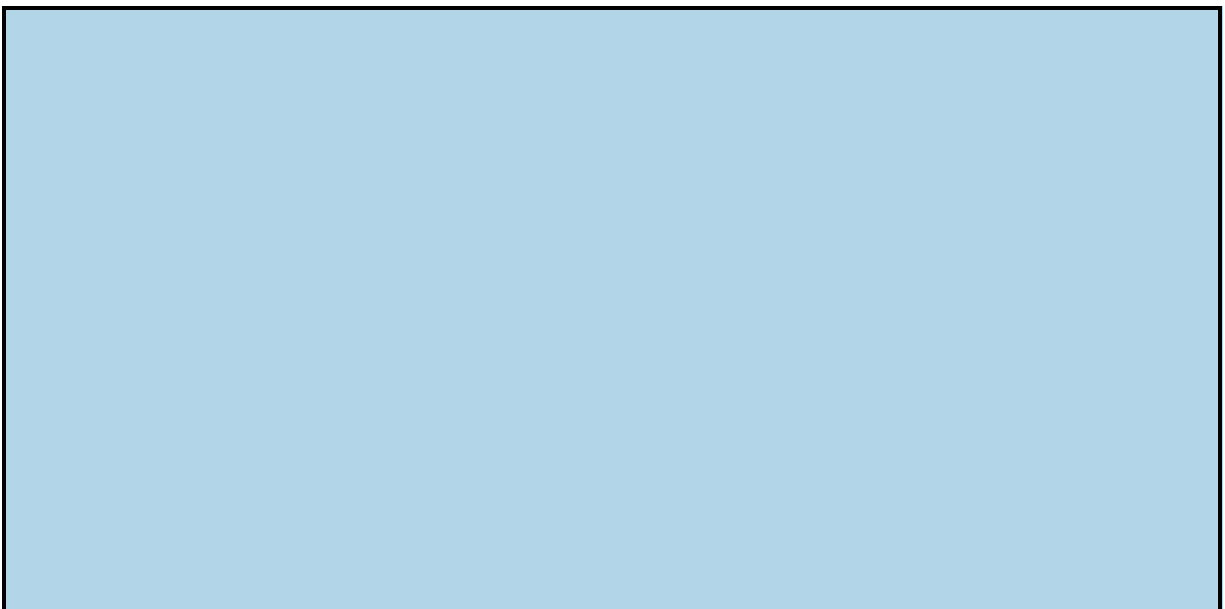
The most common meeting types

Within the small group meeting context, there are a number of meeting types. And within those meeting types there are probably 1,000 different purposes that people could identify for hold a meeting. We won't even attempt to get into the purposes of meetings because they are so varied. However, we do provide here the list of the five most common meeting types for small group meetings.

- » **Staff meeting:** A recurring, often regularly scheduled, meeting to provide updates, discuss upcoming events, coordinate tasks, and address current problems or challenges.
- » **Committee meeting:** A regularly scheduled meeting of a rotating group of organizational members that focus on and discuss a specific topic area.

- » **Project team meeting:** A group of employees coming together for a structured meeting based on the project purpose to discuss plans, provide status updates, determine leadership on tasks, and provide a project review.
- » **Shift-change meeting:** Also referred to as a handoff meeting, this meeting is between off-going shift members and oncoming shift members to exchange relevant information about the work.
- » **Debrief meeting:** A meeting scheduled as needed to discuss a recent work event, review regular operations, and/or discuss recent safety or performance activities with the overt goal of learning and improving effectiveness.

The vast majority of your meetings you have each week would fit into these common types of meetings. However, we would be remiss if we were to claim these are all the meeting types (check out the nearby sidebar for other kinds of meeting). If you want to learn how to align your meeting purposes with your goals, flick through to [Chapter 8](#).





WARNING

MEETINGS THIS BOOK IS NOT ABOUT!

In case you missed it, this book is about running effective small group meetings. That means this book is not about some other common meetings that you'll run across. Some of these already have very good *For Dummies* books of their own. For example, this book is not about conventions and conferences. These are a very different kind of meetings, with different purposes, aims, and criteria. *Meeting and Event Planning For Dummies* by Susan Friedmann (Wiley, 2003) would be a good place to start for doing these kinds of meetings.

Additionally, another meeting type that this book is not about is the one-on-one. This meeting has become more and more common as more people have the option to work remotely. In fact, some recent estimates suggest it is even becoming more common than the small group meeting on some people's calendars. Managers often use the one-on-one to touch base with their employees. They are essentially a check-in and can be used for a variety of purposes. However, by definition, they do not constitute a small group, so they don't really fit with the meeting type that this book focuses on.

We will add, however, that these example meeting types that this book is not about could benefit from some of the best practices we describe. For example, we discuss the importance of starting on time and ending on time. That's very relevant for conventions, conferences, and one-on-ones. However, having a written agenda may not be.

With this in mind, exercise caution when attempting to apply our recommendations in this book to meetings that are not within the scope of the small group meeting. You're welcome to experiment with using the tips and tricks here in other contexts, but we cannot vouch for their usefulness in these other meeting situations.

Discovering Why Meetings are So Complex

Meetings have needed a face-lift for some time now. Much of the research on workplace meetings occurred in the last ten years and decidedly showed that we could do