

EFFECTIVE MEETINGS

/ Know what meetings you really need, and get the most from them /

Meetings play a large role in any organization, and represent a substantial investment of time by all staff. Improvements to meeting effectiveness, if applied widely, can therefore offer very significant organizational audience.

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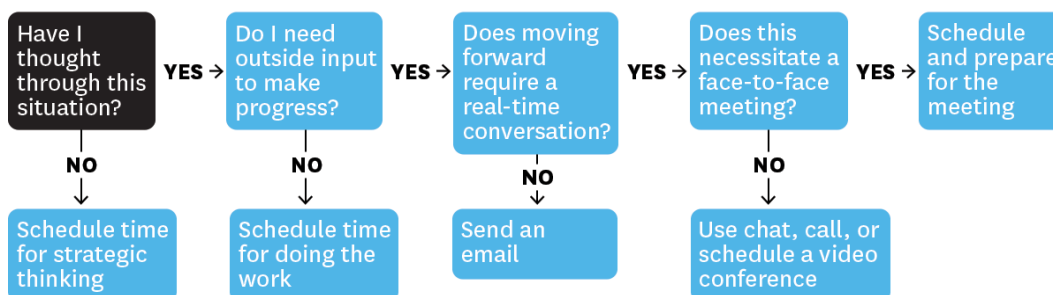
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I. SHOULD YOU ORGANIZE A FACE-TO-FACE MEETING?

Answering a few simple questions can help you decide whether you really need to call a meeting, or whether an alternative would be equally or more effective. **To confirm that you need a face-to-face meeting** (where all participants are physically together in one location), **each of the questions in the following figure requires a ‘yes’ answer**. Otherwise, proceed with one of the alternatives suggested below.

SHOULD I HOLD A MEETING?



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The following discussion unpacks and restates each of the four questions in the figure above and suggests meeting alternatives.

▲ Question 1. Have you thought carefully about the context and issues, so that you know what is needed next?

A meeting cannot substitute for doing your own thinking about an issue, so your first step is always setting aside time for your own reflection and analysis. This will help you decide what you really want, and thus will provide the **clarity of purpose that all meetings, and indeed all projects, require** if they are to be successful. Only after due reflection should you proceed.

▲ Question 2. Do you need contributions from others at this time, or can you take effective action yourself?

Through analysis you may discover **effective ways other than meetings to obtain desired results**, making a meeting unnecessary. For example, upon reflection you may decide you are sufficiently well-informed to make a decision without a meeting. Or you may

discover research – such as technical papers, or documented lessons learned from others who have tackled the same issue in the past – which offers promising solutions to the issues you are facing.

At this stage, even if you decide that contributions from others are required, you should also consider **whose** input might be helpful. If you cannot identify specific individuals whose input you need to make progress, then a meeting may not be appropriate, or may be premature.

▲ Question 3. Is a real-time conversation the best way to get needed inputs or take the next step?

A real-time conversation is one in which participants can respond immediately to inputs from others; it is different from non-real-time conversations such as email exchanges, where participants have to wait, for a short or long time, for one another’s responses. Even if you have decided you need inputs from others, you may not need a real-time conversation to get them. There are alternatives, and at this stage they should be considered:

- **Use official networking platforms** (like Yammer) to request inputs from communities of experts, to share your ideas and experiences widely, to raise organizational awareness of key developments, or to find colleagues who may know more about an issue.
- **Use collaboration platforms** (like a team site or discussion channel) to post drafts for comment and review, or to share project updates with a team.
- **Send emails** to pose specific questions to specific individuals, or to circulate draft documents, guidance or proposals (which preferably reside in a repository, with only the link shared via email).
- **Post on professional mailing lists or external online groups** to tap expertise beyond the organization.

Often, these alternatives can be both more efficient (i.e. they cost less) and more effective than a meeting. You can be very **directive** in what inputs you are requesting, you can **target specific individuals** or groups/teams, and you will automatically have a **written record** of any feedback received. These alternatives can also be **complementary to subsequent meetings**: efficiently accomplishing preliminary or related tasks outside a meeting can allow the meeting to be shorter, or can allow the meeting time to be used more profitably.

Status update meetings (meetings held to update members of a team on status of various activities within a project/initiative) **can often be partially replaced with use of a collaboration platform**. Team leaders can check status of items online; team members can coordinate activities; and individual queries can be made to clarify specific issues.

Nevertheless, you may decide that you do need a real-time conversation, because it can confirm or clarify a common understanding of complex issues among a group, and allow for

rapid feedback, brainstorming and iteration on ideas.

▲ **Question 4. If you need real-time interaction, does it have to be via a face-to-face meeting?**

A face-to-face group meeting is not your only choice: Telephone or Skype calls, one-on-one conversations in person, and online meetings are all real-time options that can often replace face-to-face meeting.

Don't assume that a single meeting is necessarily more efficient than a series of small conversations. Meetings that are too large may often be unproductive, and people may be more willing to offer complete, relevant information in **individual conversations**. You will also save other people's time by having shorter individual conversations with several persons instead of requiring all of them to sit in a longer meeting.

If you do decide that a meeting with multiple participants is needed, consider whether it should be an **online meeting**. Refer to the section below on 'Succeeding with online meetings' for additional tips. Online meetings are sometimes preferable to face-to-face gatherings even when all participants are nominally in the same location – for example, when some staff are working from home.

Face-to-face meetings involving multiple participants may be the best alternative if your objectives include rapid decision-making on complex topics, or innovation through collaborative work. They are also effective for establishing strong personal connections between key participants. They can also be useful for status updates, but this requires sustaining meeting discipline over time to keep participants involved and ensure the meeting is paying off in terms of results for time invested.

Sometimes a face-to-face meeting is good for information-sharing, especially when you have a visit from an expert, or want to highlight the success of colleagues in a particularly interesting or challenging initiative. **As alternatives to the routine format of a**

long presentation followed by Q&A, and to make the most of these meetings, use knowledge exchange methods such as Expert Interview with an Audience, or Fishbowl, or Chat Show. If there are several experts/colleagues to accommodate within a short time, use the Lightning Talks format. Or run a Brown Bag Lunch if this is appropriate.

When meeting face-to-face would require travel from at least some participants, then even closer scrutiny is needed. **Meetings requiring travel can be very costly in budget and time**, and will also have environmental impacts as compared to non-travel alternatives. Refer to the Global Meetings Guide in this Toolbox for a more in-depth look at deciding on, and succeeding with, such meetings.

If you do decide in the end that a face-to-face meeting is the best alternative, and is justifiable in terms of costs (including both time and money), then be sure to approach it in a disciplined way: apply the core principles for succeeding with all types of meetings, which are summarized in the next section.

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II. BASIC PRINCIPLES FOR RUNNING MEETINGS

Applying the following principles will improve the effectiveness of nearly all meetings, whether in-person or online.

Before the meeting

▲ **Take responsibility:** If you are organizing a meeting, then you are also responsible for the successful completion of all the meeting requirements. Even if you delegate some of this work to others, for example by having a dedicated facilitator for a long meeting, you as the organizer remain responsible for the outcome.

▲ **Define objectives:** Based on your experience, set realistic and specific meeting goals that contribute to the strategy of the team or the organization, and define specific desired outputs: decisions, plans of action, solutions, or innovations.

▲ **Choose participants:** These should correspond to the goals and outputs you want.

- Many meetings are more effective with fewer participants. Meetings that aim for decision-making, problem solving, or innovation often work best with a maximum of 5-6 participants.
- Limiting participant numbers is not always possible. In some organizations there is a strong culture of 'inclusivity', and limiting meeting participation can be perceived as un-collegial. In such cases, consider whether you can invite some people as optional, rather than required, participants. They may appreciate the extra time if they do not attend, and not attending will be their choice, not yours.
- If you need to have meetings with larger numbers of participants, consider including breakout sessions in the agenda, especially if the meeting runs for more than one hour.

▲ **Draft the agenda.** It should be clear and specific (e.g, write 'Update on the WASH in Schools program in X municipality, instead of just 'update'), with a logical structure and sufficient detail to make the desired goals/outputs achievable within the meeting, and with appropriate sequencing and timings on individual items.

- If appropriate, ask meeting invitees to review and contribute to the agenda, via email or (better) on an internal social channel. This will enhance meeting relevance and boost participant buy-in. This works best for small meetings rather than large ones.
- You as the organizer remain responsible for the final agenda. If you decide not to include suggested items, explain your decision to those who made the suggestions.

- Phrasing agenda items as questions, to be answered by the participants at the meeting, may promote understanding and engagement.

▲ **Consider whether you need an online meeting page/site** to share meeting materials including goals and objectives, agenda, meeting admin note, session flows, presentations, videos, background readings, etc. A meeting page/site should in most cases be open (visible to all staff, not just to participants). An existing team site can be used for this purpose.

▲ **Schedule the meeting**, picking the time and venue to support the outputs you want, and invite participants. Share the final agenda and any other information (preferably as links to online materials) which they will require to be effective at the meeting, but don't share more than is useful or than can be assimilated.

- If certain participants are indispensable, follow up to ensure they will attend.

▲ **Assign meeting roles**, in particular the note-taker(s). If your meeting is long or requires special room configurations or supplies, it may also be helpful to assign a logistics focal point.

▲ Consider what **facilitation skills** may be required to make the most of the meeting, and whether you need a dedicated facilitator; refer to the section below on 'Meeting facilitation.'

During the meeting

▲ **Arrive early to prepare the venue**, including projector and screens, flip charts and pens, presentations and documents, etc. If your meeting will take place online, then take this time to upload presentations, adjust meeting room permissions if needed, set a welcome message, etc.

▲ **Start on time.** Begin by stating the desired outcome of the meeting clearly: "The purpose of our meeting today is ...".

- Consider opening with an Icebreaker, if your meeting will take longer than 2 hours, or will include several persons who may not know each other well.

▲ **Announce/agree on simple ground rules**, e.g. one person speaks at a time; be respectful and concise in all contributions; stay on topic; set mobile phones to silent mode. If you have online participants, make sure they are muted to avoid external noises.

▲ **For every meeting segment**, aim for a **clear decision, clear actions** with accountability and timeline identified, **or both**.

- During the discussions, **aim to create a climate of trust, sharing and active participation**. Try to allow all who want to contribute to be heard, within the time limits of the meeting. Confirm participant understanding and agreement of any decisions/actions proposed. Control/minimize the political component (where participants have agendas other than the one set for the meeting).
- **Stay on track**, adhere to the time allotted for meeting segments, and park any questions (using a 'parking lot' list) which are not directly related to the desired outcomes.
- You have the option to gather feedback during the meeting, using Real-Time Meeting Evaluation Tools. This may help you adjust the session to maximize impact and results.

▲ Near the end of the meeting, leave at least a couple of minutes to consider **any other business (AOB)**, for participants to raise important or urgent issues that would have been on the agenda, if you had known about them.

▲ **Finish on time.** Close the meeting, or close major segments of a long meeting, by summarizing the decisions, key take-aways, any agreed action points, and persons accountable for each. Review

any parked issues, and agree on whether and how to address them.

▲ **Confirm date of the next meeting.**

Identify any topics/issues that should already be added to its agenda.

▲ If you want **participant feedback**, share a short evaluation form and ask them to complete it before leaving. Collecting participant feedback is strongly recommended for major or global meetings: Feedback will help you understand whether participants share your opinion of how well the meeting succeeded, and will provide a basis for planning future meetings. Using an online form, such as Microsoft Forms, will allow you to collect and process feedback data more efficiently.

After the meeting

▲ **Finalize and share any meeting notes/minutes**, within 3 days for short meetings and within 1-2 weeks for longer meetings.

- **Ensure clarity** of meeting results, especially regarding what was decided and follow-up actions (what, who, by when).
- If appropriate, include **discussion summaries and reference links** in notes/minutes.
- Adhere to any **customary/required formats**.
- Share notes/minutes directly with participants, and/or post them on your organization's social network. Posting the notes will enable better retrieval of key information and decisions, and improved follow-up over time.

▲ If you have a meeting page/site, update it with all final materials (presentations, notes, etc.)

▲ Major meetings that yield significant decisions/actions may also require **follow-up reports** to participants and others, shared electronically or presented at a subsequent meeting.

- If you collected participant feedback, include a summary and analysis in the report.
- Ongoing/major follow-up actions may require additional periodic reports.

▲ If additional meetings are part of the agreed outcomes, or are required as part of a series, schedule and plan them.

III. Self-assessment of the meetings you organize

If you are a meeting organizer, take time to **periodically review your meetings**, including any major one-off meetings and regularly scheduled recurring meetings. Ask yourself questions about how your meetings went, and explore how you could have achieved your objectives if such meetings were not held:

- ▲ To what extent did you achieve your meeting objectives?
- ▲ What aspects of the meeting (participants, time allocation, design and facilitation) could you have changed in order to deliver better results?
- ▲ What would happen if these meetings had not been held? How would the participants react, taking into account any feedback you have received?
- ▲ What were the costs of the meetings, in money and time?
- ▲ Are there ways to accomplish the same objectives without a meeting?

Your analysis may suggest areas of improvement. Moreover, **replacement or elimination of meetings that have not yielded any significant progress or outcomes, or that don't justify the resources invested, will improve your overall effectiveness.**

The purpose is NOT to eliminate all your face-to-face meetings. Face-to-face communication has power and immediacy not matched by any other channel, and offers benefits – like reinforcement of shared purpose among team members, opportunity for spontaneous but very valuable connections and conversations, and (hopefully) undisturbed time to focus on mission critical decisions and outputs – which can't easily be replicated in any other way. **Just be sure to keep the face-to-face meetings for when they are really justified.**

IV. Meeting facilitation

Facilitation is the art of supporting a group at a meeting, workshop or event to effectively solve problems, make decisions, learn together and achieve its objectives. It complements and goes beyond the simple rules provided above, and draws upon the facilitator's experience and interpersonal skills to help participants feel comfortable, empowered and focused on achieving a meeting goal, and reducing or removing obstacles.

Facilitation is needed for all meetings, and **skilled facilitation is very important for strategically significant meetings**, i.e. those that aim to solve important problems, make significant decisions, or foster innovation in an important new area. Refer to the UNICEF Toolbox article on Meeting Facilitation for more details on facilitation skills. Take note that facilitation begins before the meeting, and takes place through any interactions you have in the lead-up to it, and also in any post-

meeting exchanges. Facilitation can involve choosing a specific methodology (such as any of the ones described in this Toolbox) maximize constructive interaction and benefits during the meeting, depending on the objectives, the participants, and the facilitation skills available to support the meeting.

Even if you have strong facilitation skills, you may decide it is worthwhile, for significant meetings, to have a **dedicated facilitator** – someone whose only role in the meeting is to help guide it to a successful conclusion. This will free you up from having to play a double role.

V. Succeeding with Online meetings

Online meetings can offer major savings in cost, time and environmental impacts if participants are located far apart. Many or even most of the objectives of an in-person meeting (where all participants are physically present) can usually be achieved, at much lower cost, through an online meeting. Online meetings also offer some outright advantages over in-person meetings, notably the ability to **easily record the entire meeting**, for later reference or to share with others who could not attend. (In fairness, there are also disadvantages to online meetings, including reduced opportunity for networking and human interaction as compared to in-person meetings, and greater difficulty in establishing rapport among participants who may not know each other well.)

If bandwidth permits, **video online meetings are much better than audio-only meetings or conference calls:**

▲ Video meetings give a much stronger sense of being present with all participants and allow participants to see at least some of each other's body language.

▲ They also encourage participants to remain focused on the meeting (it is much easier to “multitask” when a meeting is audio only, leading to lower quality of participation).

▲ There is more incentive in a video meeting to get to the point. Hence, they also tend to be shorter than audio-only meetings.

As an essential first step, **become familiar with the basic controls of your online meeting platform** (e.g. Skype for Business), and encourage your participants to do the same, so that meeting will run smoothly. Learn how to ensure your microphone and camera are working. The Toolbox article on Webinars includes many additional tips for success in online meetings, which are also applicable to general online meetings.



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CREDITS

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