Sarah Cirone:

Hi, everyone, and welcome to today's webinar, How to Plan and Lead an Effective Meeting, hosted by HRDQ-U and presented by Natasha Terk. My name is Sarah, and I will moderate today's webinar. The webinar will last around one hour. If you have any questions, please type them into the question area on your GoToWebinar control panel, and we'll answer them as we can, or after the session by email.

Sarah Cirone:

I'm excited to introduce our presenter today, Natasha Terk. Natasha is the President of Adcom Designs and Managing Director of Write It Well. She has spent 15 years helping busy professionals save time and improve results by communicating more clearly. She leads workshops, webinars, and coaching engagements for clients who want to equip their workforce with tools that accelerate business. Popular programs include business writing, writing performance reviews, and presentation skills. Natasha also offers her job relevant, easy to adapt, communication and productivity strategies in a series of seven books that she wrote, the Write It Well series on business communication.

Sarah Cirone:

Formerly the director of Singapore based business, Natasha has consulted to hundreds of organizations around the world and trained thousands of people. Her clients, including multinational corporations, businesses, government, nonprofit, and public agencies engage her firm to solve the communication challenges that hurt business. It's an honor to have you speaking with us today, Natasha.

Natasha Terk:

Thank you, Sarah. I'm so happy to be here and be here with HRDQ and the rest of you. Meetings plague us, this is actually one of my very favorite topics. So thanks for taking time out. My goal is to return this time to you, okay? So the time you spend with me today thinking about how to create, or develop, plan, more effective meetings will return to you in terms of productivity in your meeting times, maybe shorter meetings, or let's hope for shorter meetings, fewer meetings. So again, an hour investment, but hopefully an exponential return in terms of saved time. So let's jump into it. Thanks again for the introduction, Sarah, and thanks again for being with me.

Natasha Terk:

We spend a lot of time in meetings, but many, in fact, most of them fail because they're too long and they're unstructured. If we can use meeting time more effectively, we can move on to other important tasks. Today, we'll look at ways we can reduce meeting time and accomplish more.

Natasha Terk:

Here's our overview. We're really going to focus on three sections today. The first one is on planning, so what happens before you're in the meeting room, okay? And then the second section, the middle, is around leading. What happens when you're leading the meeting or you're a participant and somebody else is leading the meeting? What are the important things to be watching out for and how do you set that time up for success? And then capturing. How many of us have been in meetings where there are

either no outcomes from the meeting, or they aren't captured and then followed up on? So that's what we're going to do in the third section around capturing value from our meetings.

Natasha Terk:

All right, so that's our setup. Course objectives: We're going to talk about best practices, I'm going to offer some tools. We're going to look at some exercises and activities that would help you add value to your organization by planning, leading and contributing to meetings in your organization.

Natasha Terk:

So like I said, these are the sections - planning, leading, capturing, and then a wrap up. I'm walking my own walk here, talking my own talk, making sure that I have an agenda and showing you where we're going together.

Natasha Terk:

I want to start by thinking about sort of an unfortunate image though, visual image - the meeting from hell. Maybe it was yesterday, maybe it was last week, it could have been six months ago, there was a meeting that stands out as a very painful memory for you. I want you to think about it, go there. It's a dark place, but I want you to go there and think about what was happening in that meeting, okay? Was there an agenda? Was the person who was leading it talking in circles or people arguing? Was there no clear objective or outcome? Did one person dominate the conversation or take it off course? What was happening in that meeting? Was there really a lot of information to go through and not enough time? Were the wrong people in the room? Okay, so let's dwell on all of the painful experiences, and then we're going to bring light to the situation, okay? We're going to see that there is something shining on the other side of it, but we're in darkness right now.

Natasha Terk:

Meeting statistics: All right, if you were visualizing that meeting from hell, sadly, you're not alone. We're all in this together. We attend lots of meetings that could be more effective. There are something like 11 million meetings held every day. Can you imagine? Many of us attend about 61 meetings a month. So that's like, what is it? Three meetings a day, something on average? Sometimes I know that there are days where you are just going from meeting to meeting to meeting all day long, right? Something like 50% of this time is wasted. Wow, that is the darkness, but also the light, right? There is an opportunity here.

Natasha Terk:

Let's assume that each of those meetings is one hour, we're losing 30 hours a month in unproductive meetings. Again, there is a shining light out there. But let's take some ownership around change because I know a lot of change management theory and behavior around it. And the first thing is really identifying our role in ineffective meetings. So both as a leader and as a participant, I want you to think about which of these meeting behaviors you have engaged in, and let's be honest, okay? Daydreaming, right? I think we can all raise our hand there. Dozed during the meeting. We had a funny and lively discussion about this. How is it possible to sleep during a meeting? I've seen it. Have you seen it, somebody's head kind of bobbing up and down? That means something, and we're going to take meaning from what happens when you see somebody sleeping. You don't want to create that environment, but maybe that was you, okay?

Natasha Terk:

Maybe you came late, maybe you left early. I'm sure you've seen others do that. You've missed the meeting entirely. Sometimes there's a legitimate reason for that and sometimes it's just bad planning on everyone's part, the meeting was scheduled at a bad time. You shouldn't have accepted it because you knew you had a conflict. A conflict arose and you couldn't protect the time. All those things happen. Or maybe you brought other work to a meeting, in which case you weren't there in your true self.

Natasha Terk:

So let's own it. I'm owning a lot of these things myself, I'm being honest, and I'm going to look at the reasons why these behaviors were allowed to happen or even persist. Okay, so we all have some bad habits. Yes, and again, you're not alone. We have a huge percentage. Most of you have, in fact, daydreamed, missed meetings, missed part of the meetings, brought other work to the meeting, or even honestly fallen asleep even if it was just for a second. So it's everywhere. It's not just you, it's not just me.

Natasha Terk:

But there are some qualities that make meetings effective, and some that we need to look at that make them persistently ineffective. I'm going to show you my chart in a second, but I just want to make this really strong statement here. A meeting is not a presentation, okay? This is actually a presentation about meetings. And why is that? That's because really I am talking to you, I'm sharing content with you, but I'm not looking for each one of you to provide feedback on a particular topic. That is a meeting. A presentation is really a one-way street. Now, when I lead presentation skills workshops, I do encourage people to find the two-way street even in a presentation, but it is less interactive. A presentation by nature is more of one person or maybe it's a panel presenting information. A meeting is meant to be interactive and engaging, okay? So let's sit with that for a moment. A presentation and a meeting, they are different.

Natasha Terk:

So here's some qualities of effective meetings. In an effective meeting, there has been consideration about whether this issue can be resolved by phone or email instead of a meeting. And sometimes you may consider it and decide, "You're right." I mean, that was an aha moment in the last meetings workshop I delivered where I asked the question, "Does this meeting even need to be a meeting?" And the woman asked me the question, I really took pause. I don't know if she had thought about that or not, but it was a moment, and I'm giving you that moment to ask yourself that question, does this need to be a meeting?

Natasha Terk:

Now, we need to make sure we develop and distribute a well-planned and shared agenda, all right? We want to carefully consider the attendee list. These are all qualities, again, of effective meetings. You've realistically considered the time needed, all right? If it's a complex issue that needs to be discussed and the plan needs to be hatched for next steps and you only have 20 minutes, you're not setting yourself up for success, right? You need to start on time. This webinar started on time. I challenge you to start your next meeting on time. You should set the expectation that meetings start on time, and you should follow through with that.

Natasha Terk:

Keep that meeting on task/on topic while focusing on solutions. Isn't it frustrating when people bring up problems and don't hold themselves accountable on some level to looking for a solution to? So that's kind of the positive mindset. So come with your solution orientation to every meeting. Encourage everyone to participate. I'm going to spend a lot of time talking about the idea of meetings being interactive, engaging and participatory. You're not going to the next meeting to talk at people. That's a presentation. You also need to end on time, all right? This webinar will end on time. Set that expectation that when folks attend the meeting that you've planned, it will start on time it will end on time. They know they're coming to a well-planned and executed meeting, all right?

Natasha Terk:

Document and distribute meeting notes with action items and deliverable dates. We're going to about how do you get ownership on those issues during your meeting, but make sure that you, as the organizer, if you are, that you take ownership of the meeting notes and next steps, and that you don't let those go until the items have been accomplished. And then follow up, like I said. Follow up post meeting with reminders of deliverables.

Natasha Terk:

Ineffective meetings are the opposite of all of those things, because that's how you do it, right? There's no agenda. You don't have the people who need to be there. The wrong people are in the room. You meet until everything has been addressed, but it's not the right amount of time allocated for issues. You have people start off by reading information that they could have read before the meeting to shorten the meeting. Instead, people are sitting in a room reading or reviewing materials. I would argue that is not an effective use of time.

Natasha Terk:

And then you wait to start until everyone shows up. You allow the conversation to meander, allowing certain people to dominate. You don't end the meeting at the specified meeting time, you just let it go on, sometimes and on and on, right? Assume people know what they're responsible for and then just assume that things are getting done the way they should be. So effective and ineffective, let's say it paints the dark and the light side of things.

Natasha Terk:

So how are you going to improve your meetings? I want to spend one more moment on this idea around the ownership really because behavior change is something that we all own. How are you going to improve your meetings? What is your attitude going into meetings? If your attitude is not positive, that is going to be reflected either in your body language, in the questions you ask, in the way or if you participate. So check your attitude at the door. Does it vary by the type of meetings? I mean, there are meetings that we are probably more excited about, but just know that your attitude toward that meeting, it can be perceived by others. So if you come in with a positive attitude, that will of course be felt by everyone.

Natasha Terk:

How can you change your attitude about those meetings? Maybe I've heard people have... If you're the meeting facilitator, for example, and you know that there's somebody who's coming in with a not desirable attitude, maybe you want to have a side conversation with them before, find out how to engage them in the meeting or in the content or the topic or the planning of the meeting, so that they

feel more ownership. If it's you with the attitude, maybe you can ask some questions to uncover why you're feeling that way or how you might change your attitude about that meeting, because again, it's not your special secret, it's out there, it is for all of us.

Natasha Terk:

What kinds of recommendations can you make to meeting leadership? I mean, politics aside, think about how you might be able to offer tools or insights or feedback or constructive help or solutions to leaders that might be struggling to get full participation or the maximum effectiveness or value out of their meeting, okay? So all of us can lead by example too. So adopt best practices, other people will copy you. That is a strong belief that we hold in everything we do around communication. So people do copy. They copy your unfortunate behaviors and attitudes, but they also copy the great ones too.

Natasha Terk:

Okay, so now we've set the stage here. Let's go into actual planning. How are you going to plan your meeting? Let's think back to that meeting from H-E-L-L, the one that was so abysmal. Did it have an agenda? And then the big questions here is, do most of your meetings have an agenda? I usually hear people say no, the majority. It's not always an overwhelming majority, but it's a majority. They say, no, meetings don't have an agenda.

Natasha Terk:

So this is your takeaway. It's not like this is brand new news, but this is a moment where you can say, "I'm going to catalyze this moment, and this is the moment that I'm going to start using agendas for all of my meetings." Even if it's a 20-minute phone call to have a meeting agenda, these are the three topics that we need to cover, get agreement on that agenda and then go forward with the conversation.

Natasha Terk:

So agendas aren't always a whole page of detail, sometimes it's three bullet points, but every meeting, whether it's a phone meeting, in person, whatever virtual setting that you might be working in, they should all have agendas.

Natasha Terk:

Okay, so let's talk about some planning steps, okay? Your supervisor, let's just imagine, has asked you to plan a meeting. Whether this is your first meeting you've ever planned or your kajillionth - I like that word - there's always room to improve.

Natasha Terk:

So let's look at some questions here. Most experts say that the most important part of running a meeting is in the planning. So a quick overview of this process, a question, what's the objective of the meeting? Who actually needs to be there? What's the agenda? What resources are needed? When and where will it be held? Okay, so these are the most basic questions you want to start asking if you're planning a meeting.

Natasha Terk:

Let's start with the purpose of the meeting. No one ever has a meeting just for the sake of having a meeting. What's the purpose of your meeting? And this goes back to that first point in my chart on

effective and ineffective meetings, right? We're asking the question, what is the purpose of your meeting? And if there is no absolute purpose, you're going to ask yourself, why are we having this meeting? I had another workshop recently where somebody said, "Oh, we have these meetings every month and we talk about the status update for our move. We're moving into a new building." And I said, "Why is that a meeting? It sounds like..." Well, I didn't answer the question for him, but I said, "It sounds like..." and then I thought about it in a while, and he said, "Well, the information is in an email. It's just that we have the meeting to go over the email."

Natasha Terk:

I'm sure there are a lot of people who have meetings to discuss what was in an email, but I'm going to challenge you to change those expectations and say, well, if there's no real participation required in that meeting, change the expectation, have people either read the email and send you back questions from the email, or have the meeting be a discussion with specific questions that they come to you with from the email, so you're not just recapping an email that you already sent. What is the purpose? The purpose is to answer uncovered questions or to talk about a particular issue that surfaced in the email. Or what is the purpose of the meeting? Because if there is no purpose, as I said, you don't need to have a meeting, right? It's sort of like email, right? If you don't need to send the email even, why send it? We have email credibility, we have meeting credibility. Let's protect our email credibility by only having meetings when we absolutely have to, when we have a purpose.

Natasha Terk:

So now I want you to look at who actually needs to be there. Who needs to be in the meeting? Have you ever been invited to a meeting and wondered, "Why am I going to this?" You are not alone. Many times people are simply invited because they're a part of an existing team with little thought to how they will actually contribute. So you need to know why you're inviting people to your meeting. And conversely, before you accept a meeting invitation, you need to understand what your purpose is for being there in the meeting. It doesn't mean that you just willy-nilly start denying all meetings, but you need to either ask that question yourself like, "Self, why am I supposed to go to this meeting?" Or ask the organizer, "What role do you expect me to provide in this meeting? Why am I coming to this meeting? Is my name on the agenda? Am I going to provide specific expertise on a topic? If I'm just there to listen, maybe this is an email."

Natasha Terk:

I'm not suggesting that we be snarky or push back on meeting leaders because they have enough trouble, right? But you just want to ask that question, what value am I going to provide at that meeting? Because we do have a lot of other competing interests and roles and activities on our plate.

Natasha Terk:

So make sure you do what you need to do to get the right people in your meeting too. Nobody has a blank calendar with nothing else on it, so you need to plan carefully to get the right people in the room. And if it's a presentation, it's a presentation, right? But if it's a meeting, you need to be able to flex your calendar to make sure you can get the right participants to that meeting, all right?

Natasha Terk:

So then we're going to look at meeting roles, and I'm going to go through these roles in more detail, but on a high level, there are different roles that people play at meetings, right? There are participants,

there are leaders, the one who's ultimately responsible for crafting that agenda, sticking to it, and starting and ending the meeting on time, among other responsibilities. And then there's also a note taker. Sometimes the note taker is also the leader, the note taker is sometimes a participant, sometimes you have a robust staff and there's a designated note taker who's not participating in is just taking notes for that meeting. But in the big picture, those are the main meeting roles.

Natasha Terk:

So let's start by looking at the role of the participant, okay? Participation or participants are those that have been invited. Their participation can typically be categorized in one of several ways: one, they're directly impacted, two, maybe they're a decision maker, or they're an expert on this subject, okay? Sometimes you end up with delegates like substitutes for another person, and that, you want to think carefully about, because if that person, if you were inviting your senior VP to the meeting because she or he is a decision maker and she's not available and she's delegated that meeting to somebody else, you want to think carefully about whether you should reschedule the meeting, because if she was there as a decision maker and her proxy can't make those decisions, you want to be clear on whether this is going to be effective or not. So don't just hold the meeting because you just want to need to kind of check it off your list of things to do. Make sure that you can use everyone's time most effectively.

Natasha Terk:

Then you have a leader, and the leader has a lot of responsibility, right? So this is all of these responsibilities around planning, coordinating, leading, and doing all the communications and follow up rest with that meeting leader. So let's look first at the role of the meeting leader. What does this person need to do? The first thing the leader needs to do is develop an agenda. We've heard this word a million times. What is an agenda? It's the list of items to be addressed during the meeting, including the overall outcome or objective that you will accomplish by meeting, by actually meeting together in one place, either virtually or in person.

Natasha Terk:

Okay, things to remember about the agenda. You might get participants involved early by having them do something. When we talk about kind of personalities, which I'm going to get to in this webinar, there are some people that have a hard time engaging in the meeting or seeing the value for them. That is another reason to have those people do something immediately in the meeting and maybe you put that on the agenda. That also helps get people there on time.

Natasha Terk:

So maybe you're going to have the first five minutes of your meeting is a quick update, everyone gets two minutes, and you, the facilitator or leader are moderating that time very carefully, maybe even with your phone or a stopwatch to make sure that you've respected everyone's time here, but you have everyone's name on the agenda appear at the beginning of the agenda that holds them accountable to being there at the start time, okay?

Natasha Terk:

So next to each major topic, think about either include in writing or at least be clear on what kind of action you need from each agenda item. Are you having a discussion? Do you need a decision? What are you expecting to happen and how much time do you expect to allocate? When I deliver workshops, even if they're a whole day long, I have my agendas down to the three-minute intervals. And it sounds

tedious, but I, a) don't want to waste anyone's time, and b) need to know what I need to accomplish in each of those three-minute intervals, or what I need to get my group to accomplish, rather, in those three-minute intervals. So think really carefully about how to organize your topic.

Natasha Terk:

Get participation or get agreement around the agenda at the beginning. So that's really a facilitation technique. If you go through, you start your meeting, you have the agenda you've developed, you could either send it out for agreement before the meeting say, "Does everyone agree with this agenda? Is there anything you'd like to add?" That way when people come to your meeting, they've already agreed that they're onboard, they're going in the same direction. If you haven't done it before the meeting itself, start your meeting by getting agreement and then keep that agenda posted at all times, so that you're always coming back to it, you're always coming back to the agenda, you're keeping yourself accountable.

Natasha Terk:

I'm going to offer you this tool, this technique called pre-work, which is also something that can be bundled with your agenda that is going to shorten your meeting and make it more effective, okay? Homework or pre-work, excuse me, is really, really great and not used often enough. So if you want to turn your two-hour meeting into a 40-minute meeting, for example, you might ask people to do all their pre-work in advance, okay? So they're reading the slides in advance and then they're coming to your meeting to discuss the deck that you've sent out.

Natasha Terk:

Now, this doesn't seem totally revolutionary. What I'm suggesting though is that you not spend time going through the deck, you just have people understand, do their pre-work before. Maybe they're reading a report, maybe they're analyzing a spreadsheet, maybe they're reading a case study, they do that on their time and the meeting itself is purely a discussion. So in training, we call this flipping the classroom. So instead of going through a workbook in a workshop, we have people go through a workbook on their own time, and then come to a training session ready to ask specific questions. Can you imagine how much time is saved that way? So put that in your pocket. Use pre-reads to shorten meeting time.

Natasha Terk:

Just out of curiosity, I'm wondering, how do you own it? Were you asked to do pre-work and did you do it? I'm giving you gold stars if you did. You were asked to do pre-work, that's another scenario, but you didn't get to it. That's super frustrating for everyone, right? And that does happen in training as well. Life does interfere either work or personal stuff gets in the way of productivity, we know this to be true. However, if you're offered pre-work, it's in your own benefit to do it, okay? And then, no, you weren't asked to do it or maybe you're not sure, in which case, let's kind of infiltrate this idea of pre-work through your organization. So think about what you could offer people, what they can do in advance to shorten and make meeting time more effective.

Natasha Terk:

So I'm not going deep into logistics and tech, but let me just say that logistics and technology are always an issue that need consideration. So whether your meeting is in a whatever web platform you're using, or it's onsite in a conference room, or it's offsite in a conference room, think through all the logistics.

Think through parking and directions and access and firewalls and link distribution and all of these things that need to be considered. Think about refreshments and whether there's a window in the room or not. That really changes the meeting or training experience, let me tell you. But just think these things through because it presents you with an even more positive image and it's less room for flustering your participants.

Natasha Terk:

Okay, so we've done all this planning, we have an agenda, we've thought through logistics, we've considered pre-work, we've made sure that we can get the right people in the room. That is a heavy lift, as they say, but you did it, okay? You have done all this hard work and you're going to go and run a really effective meeting. Let's move to section two, which is, in fact, leading that meeting.

Natasha Terk:

Okay, so you have natural tools in your toolkit, okay? You have tools in your toolkit, and the first one is really yourself. So there's three things that you have, especially if you're in a live or in-person environment. You have your voice. Well, I would argue you have that in any scenario, your voice. You can vary your voice and you should because a monotone voice is not engaging. So vary your voice, speak more loudly, speak more softly, use it for emphasis. Body language. You can't see me right now, but I am moving my hands and I also get up. And that changes the energy that I project when I move. Again, it doesn't matter whether I'm sitting in a room, in a chair, if I'm presenting live, or leading a meeting in front of a group, or I'm in a virtual environment, my body language is channeling my energy, and that's really important. And also eye contact.

Natasha Terk:

So these are the three buckets that we focus on primarily for presentation skills as well. And I'm telling you that use these facilitation techniques when you're leading a meeting, again, your voice, your body, and making eye contact.

Natasha Terk:

Okay, we're going to talk more about that when we talk about specific or difficult personalities that might be entering your meeting and how you can use especially eye contact. It's such a really important tool to get people to paying attention to you.

Natasha Terk:

Another tool that you should have in your toolkit are questions, okay? So you need to ask open-ended questions in a meeting and make sure that it's not just you, again, presenting information, but that you genuinely ask questions of your participants to get their feedback and engagement. Questions are so powerful. This is a presentation, I'm not asking you questions, but if we were in a training environment or I was facilitating a meeting, I'd be asking you questions all the time. That's how I would engage you.

Natasha Terk:

Another way of asking questions is to use what we call boomerang. So if somebody, let's say, asks me a question, I know how to answer the question, let's say I know the answer to that question. But instead of answering it, which is just me talking more, I'm going to boomerang that question back to the group, okay? So you take that question and you throw it back out there. Sally asked me a question, I could answer it, but instead I say, "Well, that's an interesting question. Does anybody else want to answer that

question, or Judy, would you like to answer that question?" And that way, I'm getting more engagement from my group. So ask questions.

Natasha Terk:

Some people don't know what questions to ask. If you're in a job interview, for example, you want to be writing those questions down before your interview. So if you're going into a meeting, you're going to lead a meeting and you think you might not have the questions, write them down in advance. Have yourself a cheat sheet of three or five or 10 questions that you want to ask the meeting participants, so that there's that constant two-way street there, that they're always engaged as well.

Natasha Terk:

So you're also listening. You need to be a really good listener in a meeting. You want to paraphrase. So if somebody's offering feedback, you want to make sure that the comments are being paraphrased and captured, but you're not just filling more space. Listen in a meeting for common themes and connections, and also listen for resistance and objections. Just did a workshop recently for a group that was developing new products for a big multinational company, and the workshop, actually, was all about understanding resistance and objections. Because what happens is that if in R&D when you're developing a new product and you know somebody has an objection or concern about a product and they don't bring it up early in the research and development process, then it comes out later and it can derail the whole project... excuse me. You don't want that. You want to understand resistance and objections early so that you can address those issues. So listen for those things.

Natasha Terk:

Be inclusive. And we're going to go through this idea person by person, but make sure everyone contributes to your meeting. There should be nobody who has the space to daydream or, especially, to fall asleep during your meeting, okay? I mean, if it's 100 people, that's not a meeting, that's a presentation and that's different. But if you have six people, everyone should be engaged the whole time and they should be contributing as appropriate during the meeting, okay? So that's being inclusive. Like I said, asking questions are a great way to generate inclusion.

Natasha Terk:

Manage: be a manager too in your meeting. So if you are leading this meeting, you are managing, you're establishing goals, the agenda, and you're working towards achievement. You are keeping track of the time. You're keeping the conversation focused, you're getting agreement, and you're redirecting as necessary. It is your job to manage this meeting.

Natasha Terk:

Establish a parking lot if necessary. Sometimes haven't heard of this idea. The idea is that you take a flip chart, piece of paper and you write at the top of it, it says "parking lot". And something that doesn't fit into the agenda, you can put on a parking lot, so that person who offers that topic feels like they've been heard, but understands that it doesn't fit with the agenda, okay? So they've been heard but it doesn't fit, you're moving forward, you put their issue on the parking lot. Come back to the parking lot at the end and just address how you're going to tackle the issues that were on the parking lot. Don't leave it there forever.

Natasha Terk:

Manage the challenging participants. So take some tools that I'm going to offer you next and put those into action. And then clarify, restate and assign key action items or next steps. That's about capturing, which is what we're going to get to.

Natasha Terk:

But I want to talk now about some of the difficult personalities that might come to your meeting, and I'm going to give you some tips and tools for managing these particular kinds of personalities that you may encounter in your meeting. Okay, so I'm going to tell you about Talkative Taylor, there might be Alex the Arguer, Withdrawn Wren, Charlie the Complainer, Mobile Murphy, and Distracting Dallas. These are just hypotheticals, they're no real person. Actually, these are gender neutral names, but I do like that picture of the mugshot folks back there. But you'll see that this is not calling out anyone in particular.

Natasha Terk:

The first one is Talkative Taylor. What I'm doing here is I'm setting up some strategies for the kind of common personality types that you might see in a meeting and that you're going to need to manage when you're the leader. So Talkative Taylor - Taylor loves to hear the sound of his or her own voice, so it's difficult to listen to other people. What can you do? Thank Taylor for their contribution, okay? Taylor wants to be acknowledged and heard. Turn your eyes and body away. That might be a way if you're walking in the room, turn your body away from Taylor so you're not feeding energy to Taylor. That sounds aggressive, but it can be done very subtly and gracefully.

Natasha Terk:

Use humor or smile to get other people to engage in this conversation. If Taylor is talking and talking, talking, cut Taylor off maybe with a summarizing statement or pretend you don't hear Taylor. That's pretty extreme, right? And call on someone else. What we're doing though is we're looking for an effective meeting and we don't want to allow Taylor to take our meeting in a different direction because this meeting is owned by every participant, not just Taylor, okay?

Natasha Terk:

So another person you might find in your meeting would be Alex the Arguer. Alex is quick to find fault with the ideas or plan. What are you going to do? So you're going to keep your cool. You're going to acknowledge Alex's level of passion and ask for the reason behind it. Request Alex's backup assertions and ask for evidence. And then if they're angry questions, refer them to the group. If Alex gets personal, ignore it, all right? Reframe it, and use this inclusive language like "we" instead of "you" or "me". So Alex is not going to be allowed to argue the whole meeting away.

Natasha Terk:

Withdrawn Wren. Wren sits like a bump on a log and doesn't contribute. So what are you going to do to engage Wren? It's your job as the meeting leader to really engage Wren. You need to treat Wren with respect. You might engage Wren by posing a question. So that's a way to engage Wren, right? Ask a question that you know that Wren can answer. Subtly incorporate Wren into the group by using Wren's name in hypothetical. Has anybody ever tried that? You can paint a scenario and say, "Let's say we were presented with a challenge last quarter, but Wren came up with a solution." Now you've got Wren's attention. People love to hear their name. And so if you can use their name in conversation like in the hypothetical setup, you may be able to bring Wren into the conversation. And then like I said, ask Wren

a question maybe, and then give Wren some positive feedback for answering it. So you just want to make sure that Wren is engaged and you're looking for tools to do that.

Natasha Terk:

Charlie is a complainer, complains about everything. You can apologize, empathize with Charlie. You might find ways to use humor, refer the issue back to the rest of the group, "Is everybody else experiencing this?" And if nobody else is, that might allow Charlie to kind of cool it a bit. Set the rules if you need to. Criticism is acceptable as long as it's constructive. And then maybe you need to take Charlie's comments and put them into a parking lot.

Natasha Terk:

Oh, my gosh, in today's day, we always have a Mobile Murphy, right? Mobile Murphy will not put the phone down. It's really difficult to put the phone down, I get it. There are so many things happening in our phones all the time, but what are we going to do with Murphy? First, you can state the ground rules at the beginning to get full participation. I always do that in live meetings. Ask people there's a quid pro quo, "I'm going to make sure that this meeting is engaging and that you have a role in it. My ask of you is that you do put your phone away unless there's something absolutely urgent, and I promise, again, to keep the meeting on time and on topic."

Natasha Terk:

Consider giving Murphy a role so they can get engaged. If you see somebody on the phone, it's going to be harder for them to go back to their phone if they're actually presenting information or sharing their content knowledge. Ask a question like I had suggested earlier with Wren, right? Get Murphy involved by asking questions or use those hypotheticals to get Murphy's attention. Ask Murphy a question that he/she can really answer easily, and then they are kind of engaged more and may stay engaged continuously.

Natasha Terk:

So we're trying all these things, we're moving our body in the direction of the person who's distracted. We're using eye contact if they look up from their phone, and we're using their name when appropriate or hypotheticals and asking questions to that person who's on their phone.

Natasha Terk:

The last character is Distracting Dallas. So Dallas has a really hard time not distracting others. So maybe he/she has another report that they're pulling out of their briefcase or something on their phone or a little toy or a fidget or something that they came in with. There's just stuff going on. And so what are you going to do? You're going to engage Dallas by asking a question, subtly incorporate Dallas into the conversation. Again, ask questions, make eye contact. And like I said earlier, consider giving Dallas a role in the meeting, okay? Because if Dallas has a role, he/she is more likely to be engaged in that conversation.

Natasha Terk:

So I'm curious to know who you see most often. I think I see a lot of Mobile Murphys these days, just people who have a very hard time putting the phone down. It's plaguing our society and it's making us really productive in some ways, but really highly distractable. So, again, go back to those suggestions,

put the phone down or lay down the ground rules at the beginning, ask for that quid pro quo, make sure that person has a role in the meeting, all those techniques that I've shared.

Natasha Terk:

Lots of these things are happening too when we're in a virtual environment. So I want to share some of these best practices with you what happens virtually. So really all the same things are happening virtually, and as a leader, it's your responsibility to make sure all the good things are happening, like an agenda is developed well in advance that you get buy in. I would also really stress the idea of having different people's voices on the call, giving different people roles in your agenda, because otherwise it's a one-way street, and especially in a virtual environment, people can be off doing other things, looking at other screens. We do technology that helps us now understand what people are doing on other screens, but it doesn't negate the distractibility of folks. You want your next meeting to be so engaging that people don't have room, essentially, to wander off. They know that they have value and they have a role to contribute at your meeting, so they're not going anywhere.

Natasha Terk:

So specifically, think about the people, the number of participants you need and you want to have in your virtual meeting, right? If you have 45 people, that's not a meeting, it's a presentation. Take into consideration time zones. Of course, if you're in a global organization, you want to share the pain of having those midnight meetings. Include an agenda, avoid last minute changes, do a tech check. Consider the number of presenters because that gets really clunky and awkward. Announce the person speaking, "Hi, it's Natasha. I just wanted to add..." something like that. Make sure your participants are prepared to participant... to participate, excuse me.

Natasha Terk:

Consider the background noise in your setting. I always have a different meeting structure depending on how I know organizations are organized or where they're sitting. One of my favorite clients is a construction company, but oftentimes folks are joining from a site, so they can't take themselves off mute, they just can't, at least for the whole call, not until they're talking, because otherwise there's like sledgehammers and cranes and people are yelling, and all of that, you can imagine. So just moderate based on what you know their reality is.

Natasha Terk:

Follow the same participation etiquette. Be sure to avoid side conversations. And check out your camera presence. We've all had those funny and awkward kind of cringy experiences of not knowing that you're going to be live and not prepared to being live. So best practice is to always be ready to go live and full camera if you are anywhere near your work computer screen, okay? So best practices, again, for virtual meetings, that's part of our life.

Natasha Terk:

You've hopefully heard me thread examples through my conversation today. I suggest that you do the same. We love stories. I know story telling is so buzzworthy today, but there's a reason for that. Stories and examples are relatable. So when you're launching your next meeting, think about queue up, just like you queued up some questions. Queue up some stories or examples of times that you faced similar challenges, or your team has overcome obstacles, or your competition has dealt with a certain issue or

situational issues. So be sure to have examples and stories at the ready. Again, you love them, and I love them, and your meeting participants love them too, okay?

Natasha Terk:

So we started off by talking about planning an effective meeting. Well, first we started by looking at sort of the environment of meetings, right? Then we really got into what do we need to do to set ourselves up for success. Then we got into the leading, how do we lead an effective meeting? And now we're into our third section, which is capturing value from our meeting, okay?

Natasha Terk:

So we have to make sure that this time is not wasted. One of the ways to do that is to close effectively, okay? So the way you close the meeting is critical. So don't just let it kind of slide at the end. Make sure you've addressed all items on the agenda. So go back to the agenda and make sure that you've covered all the items. Make sure you've got agreement on the decisions that were made and that you're clear on next steps. I'm going to talk more about that. End on a high note by acknowledging some of the impact of the meeting, okay? And if you want to, especially if you want to encourage somebody who participated who doesn't normally participate or doesn't often feel comfortable participating or really went above and beyond to prepare something special for this meeting, call them out. We all respond really well to feedback like that. So call people out, have a moment at the end where you acknowledge contributions of people in your meeting, okay?

Natasha Terk:

So that's a way to end on a high note. I want to ask you guys some more questions about how do you close. Do you send meeting minutes out? Some people, absolutely. They end their meeting, they type up some notes, and they send them out. I said some notes. The degree, like I said, of detail and specificity in your notes probably varies, and I would say that only you can be the judge of that. Ask yourself how much detail participants need and what kind of form. I mean, are these last days? Is this a lasting document? Is this a government institution and you need to make sure that you have record of meeting minutes? Are they just high level notes introduced? So think about how much detail should be in there.

Natasha Terk:

Do you sometimes send those reminders out? Well, sometimes I do and sometimes I don't. And then some people just never do. They figure that people are professional and they'll take care of it. So I would say type up those notes, hold onto those to-dos, keep them on your to-do list until those action items are actually completed, okay? Best practice like I said. You own those action items, even if they're on somebody else's list, until you know they've been accomplished.

Natasha Terk:

As a review, make sure that you're reviewing agreements on the decisions. Again, capture and review next steps, acknowledge and thank participants. If you're going to write down three bullet points for how to close the meeting, here they are. Again, make sure you've gotten agreement, capture and review next steps, and acknowledge everyone's contributions, especially the standout contributions.

Natasha Terk:

I usually have people ask more questions about meeting notes and I address some of my high-level thinking around how much detail but in writing. And if you've ever attended or plan to attend my writing

workshops, you'll hear me say at the very beginning, it all depends on your audience. So think about your reader. Don't just tell them what you thought was important in the meeting, tell them what they need to know, okay? What do they need to know to get their piece of the next step done or to share information with their colleagues or what have you. So meeting notes, you may want to be capturing decisions made, next steps - how next steps will be tracked. Those are the kinds of issues or notes that might be in your meeting notes.

Natasha Terk:

How are you going to follow up? How will you ensure that next steps were defined and were accomplished? Send the task list to the entire group. Thank people publicly for accomplishing significant tasks. Like I said earlier, acknowledgement is such a powerful reinforcement technique. And remind people who have not completed the task. If you've led your meeting and tied the meeting to the purpose, it will not be as difficult to send those followup reminders. You can cite the purpose of the meeting, remind them why these tasks are important - remember how the meeting was about X, Y, Z, and we talked about X, Y, Z, and here are the followup steps to complete our work on X, Y, Z. So it's all integrated there. Go back to the most important points there when you get to the next steps.

Natasha Terk:

As a summary, again, to run your next meeting or to participate effectively, you're going to include all three pieces of this puzzle: the planning, the leading and the capturing, okay? Planning, leading and capturing.

Natasha Terk:

I want to thank you. I know we have some questions, Sarah, that are coming up next, but I am ready for them and want to say thank you.

Sarah Cirone:

Thanks, Natasha. That was great. Yes, so we have a couple of minutes here for questions, and the first one came in from Kate, and she wants to know if you have any advice for getting senior leadership more engaged in having effective meetings.

Natasha Terk:

Oh, great question. There are senior leaders that care deeply about effective meetings and they see the pain of ineffective meetings. Intel, apparently, was or is still famous for their meeting culture, and the meeting guidelines are posted in every meeting room. So some organizations are more deeply invested in effective meetings, and some are a bit more casual on that front.

Natasha Terk:

In terms of engaging senior leaders, you could, if they're coming or you want them to attend or participate in your meeting, I would say, get them involved in planning at the front end. So ask them what should be on the agenda or get their feedback for an agenda you might've drafted. Give them a role on your agenda. All these techniques will get them more engaged in the meeting. And then, see that you're planning an effective meeting. You may even state your ground rules at the beginning of the meeting, "I just spent an hour," for example. You could tell them, "I just spent an hour on a webinar thinking about how to run effective meetings and I want to share some best practices with you. These are some of the best practices I've used to shake this meeting." And so that might be kind of a direct but

indirect message to your senior leaders about how you can catalyze what you've learned to save everyone in your organization time.

Sarah Cirone:

Yeah, that's great. We have another question coming in here from Kelly, and she says, "My staff hates meetings. Are having breakfast and lunch meetings a good or bad idea? Will food be a distractor to the effectiveness of that meeting?"

Natasha Terk:

Oh, geez. Well, I mean, people are more likely to come to a meeting if there are treats of any kind - breakfast, lunch, snack, tea, anything. That said, we really want to focus on the agenda itself. So that should be sort of decoration, but not the reason that they come to the meeting. They should be coming to the meeting because the topic is important to them or you've done all this hard work to show them how the meeting is going to be worthwhile for them. So think about these tools around putting their name on the agenda, for example, to show how they have a role in it. Make sure the agenda is worthwhile. Demonstrate that you have history of running effective meetings. People are more likely to accept your meetings if they know you're going to start and end on time and you're going to accomplish your objectives, you have an agenda, all of those positive attributes. So I would say don't lead with the food. Make the food kind of the secondary benefit, but do the hard work necessary to plan and lead an effective meeting.

Sarah Cirone:

It looks like we have time for one more question here, Natasha. Tom would like to know how can a facilitator rebound from tech difficulty at the start of a meeting and still accomplish something?

Natasha Terk:

Yeah. I mean, it's happened to everyone, and if you can keep your cool... I mean, the best situation of course is that you've troubleshooted before, and I would argue that 75% of problems can be mitigated by effective troubleshooting, making sure that you're not going to run into a problem along the way. But in the 25% of time that it happens even though you did everything that you could have done to make sure that it runs smoothly, be honest, be transparent, keep your cool, ask people to go work on something else and then come back. I would say be honest. And if you have, in fact, done your troubleshooting, you're going to be less flustered because you knew you did everything that you could have to set yourself up for success.

Natasha Terk:

I think the most difficult situations are when you knew you could have probably avoided that tech problem, but you didn't do what you needed to do to do that. So set yourself up for success and you're going to have, a) a better chance of it, and b) you're going to have more confidence solving the problem knowing it was beyond your control. So keep your cool and do your homework.

Sarah Cirone:

Well, thank you so much, Natasha. That was great.

Natasha Terk:

Thank you, Sarah. I so enjoy being with you. Thank you.

Sarah Cirone:

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Sarah Cirone:

Thank you so much, Natasha. This was a wonderful presentation, filled with an abundant amount of information, and thank you all for participating in today's webinar. Happy training.

Natasha Terk:

Thank you.