Chairing Meetings **Toolkit**

GALLANACH

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TOP TIPS
FOR CHAIRING MEETINGS

1. **Prepare, prepare, prepare** – never chair a meeting without preparing in advance
2. **Set goals** – identify the main outcomes the meeting needs to achieve and how you want to chair
3. **Create clear agendas** – make it clear what the meeting aims to achieve and how agenda items will be dealt with
4. **Make them engaging** – think about different ways of running the meeting to keep engagement high
5. **Keep it short** – schedule a realistically short meeting wherever possible
6. **Anticipate issues** – consider and plan for any issues, challenges or conflicts that may arise including trying to resolve before the meeting as much as possible and/or have options for managing them in the room
7. **Stay focused** – keep the meeting focused on the relevant subjects and to time
8. **Reflect** – take time at the end to reflect on the effectiveness of the meeting and how you can improve as chair
9. **Follow up actions** – follow up as soon as possible after the meeting

INTRODUCTION

Most managers spend a significant amount of their working time in meetings. Given their prevalence, most organisations provide remarkably little development support for chairs to ensure meetings are a productive use of time. Indeed, many managers waste time in unproductive, lengthy and, sometimes, unnecessary meetings. Organisations that ensure meetings are focused, productive and time efficient will not only improve the value of meetings, they will free up management time to deliver priorities.

The purpose of this toolkit is to provide structures and techniques to chair meetings effectively. There are a variety of tips, tools, examples and structures in the toolkit to improve your ability to chair and maximise the effectiveness and enjoyment of meetings. You can use it as a manual to work through as you prepare, deliver and reflect on meetings, or when thinking about specific challenges you may have.

The toolkit is split into three sections; planning, delivery and follow up. There is some overlap between each but applying this structure will improve your overall approach as a chair.

PLANNING

Planning and preparing for meetings is vital. Coming into a meeting unprepared as a chair is unlikely to result in an effective meeting. Make sure you schedule sufficient time in advance to prepare properly and fully. Block out time in your calendar for preparation time.

Where you do have to chair at short notice (including as the meeting is about to start), take time to run through the meeting aims, agenda and timings beforehand even if this means delaying the start of the meeting.

The main elements of meeting preparation are set out below. Use them as a checklist during your preparation time.

1. Determine the type of meeting

Firstly, identify what type of meeting is being held. There are lots of different types of meetings so we've put them under 7 possible types although remember one meeting may contain various elements of the 7.

☐ Ideas

These are creative meetings. They don't always need to be structured or formal. Create an environment to allow for creativity to flow. Think about the room and seating arrangements, how ideas are presented and discussions take place. Moving to various "idea stations" will encourage creativity as will group techniques such as liberating structures.

☐ Board or executive

These meetings are similar to strategic meetings and are usually highly formalised and structured. Given the nature of the discussions and people attending, they can be highly challenging to chair.

☐ Project

This will be a structured meeting. The aim of this meeting is to see if a planned project is currently on track. During this meeting you will need to see if there are any barriers to the project running smoothly and list these item by item to be discussed. Pre-work for this meeting should be done by the various staff members in charge of certain aspects of the project.

☐ Teams

This type of meeting usually consists of members of teams, led by their manager although can be broader cross-organisational teams. Team meetings are likely to comprise a variety of the 7 types.

☐ Operational

This type of meeting is also structured and usually requires reports and updates to be done by the various managers in charge of the operational structures you will be discussing.

☐ Performance

In this type of meeting you will be discussing performance reports and indicators often with a focus on data.

☐ Strategic

These types of meetings usually look at long term vision, purpose and goals and how these are being met. The essence here is people are planning and thinking for the future and checking they are taking the steps now to be ready.

2. Set the Agenda

Once you have identify what type of meeting, the next step is to decide the agenda. Clearly, the agenda will be determined by the type and business of the meeting.

The key to doing this well is to set out the purpose of each item (eg; for decision, discussion or information) and ensure there is sufficient time to cover all the items. If not, then you will need to drop some items.

Schedule the most important items early in the agenda and ensure there is sufficient time to conclude each item. If discussions necessarily overrun, make sure you have planned in advance how to deal with the remainder of the agenda, including where you might defer items for later.

A good structure for board, executive and strategic meetings is set out below and can be adapted as required.

01	Check in, welcome and introductions
02	Apologies
03	Conflicts – where it's necessary to declare any conflicts of interest
04	Previous actions – what was decided on, has it be done or not done (ideally with an action log)
05	Big items for decisions
06	Big items for discussion (5 and 6 are the priority topics so spend most time on these)
07	Reports for information (taken as read unless there are key points to make)
08	Reflection – take time for all to reflect on the effectiveness of the meeting and seek feedback about the chairing
09	Date and time of next meeting
10	Close

Practice Tip

Did you notice that AOB is not included? A good practice is ask for AOB in advance of the meeting and if they are sufficiently relevant and important they should be added to the agenda.

3. Length and Timing

In order to keep everyone engaged and to encourage people to attend meetings, it is best to keep them as short as possible. Just because a meeting has always been 2.5hrs long, doesn't mean it needs to be. For longer meetings, set yourself a challenge of reducing the time they take. Shorter, focused meetings are usually more productive and people will be grateful for the time back

There is an important social element to meetings, so meetings shouldn't exclude the opportunity for people to share and interact but make this proportionate to the nature and timings of the meeting.

Practice Tip

One organisation made all meeting attendance voluntary. Half of the meetings stopped as nobody attended and the chairs of many others had to lead meetings very differently to ensure value and attendance. Another organisation gave managers the challenging of cutting all meeting time by 50%. What could you do to maximise productivity and minimise time commitment?

Try and schedule meetings at a time when people are most productive.

4. Goals

Identify the key outcomes for the meeting. For example, what decisions need to be made and what point should be reached with a discussion item? Being clear about what is to be achieved in advance will make it more likely to happen.

In addition, set some personal goals as chair. This could be developmental through adopting a different style or approach or about how people contribute to the meeting. Some chairs will actively set goals to encourage equal contribution from everyone at the meeting.

5. Identify challenges

One of the most important elements of preparation is to anticipate the issues, challenges or conflicts that could arise and plan how to deal with them. Usually, but not always it is about the people in the meeting and their views and behaviours. Having a plan to manage this will reduce the likelihood of it becoming disruptive and distracting in the meeting.

This could involve work beforehand with some individuals to prepare for the discussion and deal with or minimise issues in advance. Another approach is to plan the meeting so the relevant item is dealt with in controlled way, for example by bringing in a wider range of views from the group and not allowing those with the strongest views to dominate. Alternatively, adopt a different meeting structure by splitting people into sub groups and request collective rather than individual feedback.

Practice Tip

When you know that strong disagreement between individuals will arise in a meeting, bring them together beforehand. Let them listen and understand each other to find common ground rather than fight it out at the main meeting.

6. Actions from previous meetings

Review what was discussed in previous meetings, ask in advance for updates on previous actions in order to use your time in the meeting efficiently. This is also a good time to check in with those attending the meetings and providing support where appropriate to ensure actions are taken.

7. People – who and why

Think about who is attending the meeting and why. A good test for attendance is that people should bring value to the meeting and get value out of it. If they don't get both, then question why they need to be there.

Sometime people will attend and contribute very little of substance, either through not speaking or contributions of little relevance and value. As chair, how can you help them make a more productive contribution or is that they shouldn't be there?

Some meetings have representatives attending, either as deputies or where it is felt teams or departments need to be represented. Both can have value, but test this to make sure it works.

Think about the behaviours people bring into the meeting and what you can do to encourage the right behaviours. You could support some to build confidence to speak up more and coach/give feedback to others who would benefit from more relevance or even to reduce their input.

This approach also enables a chair to work out how to prepare for more challenging discussions and what behaviours people might exhibit when passions and emotions rise.

It may also be wise to allocate roles to people either formally as vice chair or minute taker or informally to help progress discussions. The latter approach can be a good way to resolve conflict whereby one or two individuals can take the focus away from the chair and others to move a discussion along.

DELIVERY

Practice Tip

Don't underestimate the power you have as a chair. The people in the meeting, including those more senior, will be looking to you to manage the discussions and time. You've been asked to chair for a reason.

1. Be assertive, in control and relaxed

People look to the chair to take charge and set the tone of the meeting. The role comes with authority.

As chairs build experience and through practice and feedback, they will find a style that delivers outcomes, works for them and the attendees. As with all aspects of leadership, adaptability is important as different meetings and situations may need different styles of chair. It is equally important to be authentic and not to try to be someone you are not.

However, all chairs must be prepared to be assertive when necessary, in control at all times and sufficiently relaxed to think and act as the meeting progresses.

2. Manage emotions

In some meetings, emotions emerge that need to be managed. For a chair, it's important to manage emotions, both yours and the people in the room and direct these towards a useful purpose.

If you are mindful of your emotions then you are supporting others to demonstrate a similar mindset. The following points will be useful for you to think about:

a. Be aware of your own emotional triggers and how to manage them.

b. Take time out if emotions are getting in the way of the meeting.

c. Planning, preparation and taking time to think how people might respond in advance is time well spent.

d. Sometimes emotions are good but don't let them sidetrack or overwhelm the meeting.

3. Have meeting ground rules

Asking meeting attendees to agree how they will operate and behave within the meeting is a simple way of avoiding and dealing some of the challenges of working with groups. However, although it's common to do this in workshops, it's much less common in the variety of business meetings even though it can be just as valuable.

Typical ground rules can be as follows.

- Be respectful of others
- Listen
- One speaker at a time
- Be present and focused
- Switch off devices unless using them for meeting purposes
- Be succinct and relevant
- Read the papers in advance

Having ground rules provides a framework for you to manage the meeting and the people there. It also enables others to challenge when ground rules are broken. Once ground rules are well established there is no need to refer to then them expressly but make sure they are written on the meeting papers for reference if needed.

4. Stick to overall time but flexible within the agenda

Start and finish on time. It is likely there may need to be some flexibility within the overall timescales but always aim to finish on time, even if that means deferring less important agenda items. If there are important items still to cover, seek the agreement of the meeting to extend or defer.

Practice Tip

One CEO of a national charity became frustrated at meetings starting late. To change the culture, he insisted all meetings he attended started on time regardless of who was late. Soon, all meetings started on time.

5. Ensure everyone contributes

As highlighted above, some people may be reluctant to contribute fully to a meeting. As chair, take time to find out why and what support they need to increase their contribution. This might be the chair invites them to speak or provides agenda items for them to lead on, both with prior agreement.

A good chair will ensure that everyone has the opportunity to be heard although for some it may take more support to get there and for others it may be the meeting isn't right for them.

6. Don't let a few dominate

Conversely, some people can over-contribute and dominate proceedings to the detriment of others and the meeting aims. There are a variety of techniques to deal with this. Here are a few suggestions.

- [ ] Ask them to pause and bring others in.
- [ ] Invite others to speak before the more dominant ones.
- [ ] Take a different approach to discussions – for example, split into sub groups and feedback through individuals chosen by the chair.
- [ ] Provide feedback and support outside of the meeting.
- [ ] Ultimately, a chair may just need to be politely assertive to a dominant individual within a meeting. Using gentle humour can often help.

7. Bring late arrivals up to speed

Provide a quick summary to late arrivals of where the meeting is on the agenda and give them space to settle in. Unless they are persistent offenders in which case some feedback between meetings is needed.

8. Focus – bring discussion back to the relevant points

The entails a similar approach to dealing with dominant characters. Start with gently trying to pause and bring the discussion back and if that doesn't work, again a chair may need to be politely assertive as well as offering support and feedback outside.

9. Be able to manage conflict and behaviour

Where anticipated in the planning stage, a good chair will have managed this in advance and have techniques to deploy in the meeting such as referring back to ground rules, those identified with managing emotions and dealing with dominant individuals.

Practice Tip

When the conflict or behaviour is directed at the chair, this can be challenging to deal with. If you can keep cool and respond in a measured way, well done. If you feel the emotions are rising and are not sure what to do, buy yourself some time through asking them to explain again (I'm sorry, can you repeat that as I missed some of what you said) or look to a sympathetic person in the meeting to challenge back while you check the emotions and gather your thoughts.

There are some behaviours that are unacceptable (for example those amounting to disciplinary offences) and should not be tolerated. A chair should make this clear and deal with it appropriately afterwards.

10. Use different meeting methods

Most business meetings follow a very similar pattern of working through the agenda with discussions and presentations with the whole group. There are other ways of running meetings or parts of them – look at using sub-groups or work in pairs to generate ideas and different perspectives. Look at Liberating Structures for example. Using different meeting styles within a meeting can keep the energy and engagement high.

11. Decisions

Summarise discussions leading up to a decision so the meeting is clear about the key points to consider.

Practice Tip

If you're good at making mental notes, practice summarising in your head as people speak but also make some scribbled notes as a reminder. Alternatively, ask the key contributors to summarise.

A few types of meeting will need a vote to reach make a decision. However, in business meetings this should rarely be the case and a good chair will work hard to reach consensus wherever possible. However, actively discourage circular discussions and politely move on when issues re-emerge unless there is value in opening up.

Again, planning in advance and doing work with some individuals ahead of the meeting to prepare them can be very effective.

12. Reflection Time

Make time for reflections at the end – what went well, what could be improved, seek feedback. Both from the meeting perspective and how it was chaired. Always look to improve.

FOLLOW UP

1. Reflect, learn and plan next one
2. Resolve any issues or conflicts as soon as possible after the meeting
3. Immediate chair action – what are they and schedule time to get them done
4. Prepare minutes quickly – focus on actions and key points
5. Seek feedback

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