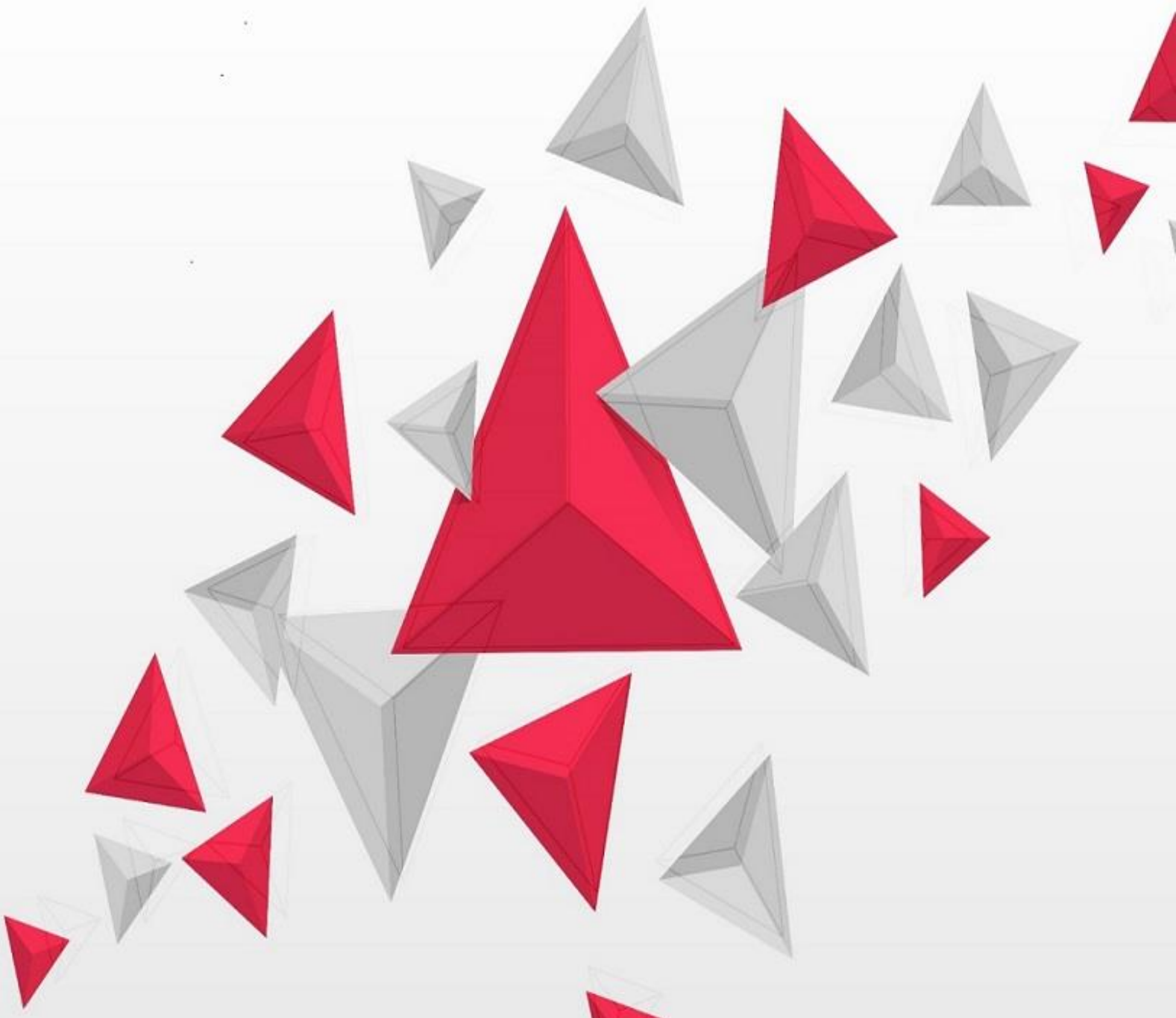


# Meeting Management

## Guide Book





## MEETING MANAGEMENT – INTRODUCTION

Have you ever attended a discussion where you were unnecessarily invited, only a handful of attendees dominated the conversation with most of the others just physically present and you were sitting there like a mute spectator, unclear about your role and wondering when this ordeal is going to end?

Welcome to a mismanaged meeting!

Today, I am going to teach you how to avoid such situations and make each of your meetings highly productive. We will start with step by step guidelines towards organizing and facilitating meetings while learning tips and tricks along the way to make each of your future meeting worth its time!

Now, you better be ready and attentive to this one.



## WHY HAVE I INCLUDED THIS LESSON?

You might be wondering why we have included this lesson in the first place as we are only talking about the documents that a business analyst author or help author.

Before answering those questions, let's take a look at some of the statistics:

- About \$37 Billion are spent on meetings every year – in the US alone!\*
- 73% of attendees do unrelated work during meetings#
- 9 out of 10 people daydream in meetings^
- On average, an executive spends 31 hours in meetings every month (that's 4 working days)

\*As per the report by the Bureau of Labor Statistics, USA.

#CBS News

^ Dr. Donald Wetmore, founder of the Productivity Institute

Turning our attention to projects, **a Business Analyst, on average, spends around 3.2 hours a day in facilitating and attending meetings** – the highest compared to any other role, be it Technical Lead, the QC members and even the Project Manager himself!

Now, don't you want to excel in something you are spending a third of your office time each day?

Running meetings the right way will help a Business Analyst be more productive and help others get the most out of the meetings they attend.



## THE ABC OF MEETINGS

I have created the easiest mnemonics to help you remember all the necessary steps of conducting the most effective of the meetings.

It's as easy as ABCDEF. Well, quite literally!

- **A**genda
- **B**ook
- **C**onduct
- **D**ocument
- **E**xchange
- **F**ollow

A staggering 60% of the meetings can be made productive if you can only remember the above series of steps. Let's dive deep into each one of the steps.

## (A)genda

First and foremost, every meeting should have a purpose, an objective defined for the meeting – it's called the meeting agenda.

Answering these following questions will help you lay out a clear agenda:

- Why am I scheduling/attending this meeting?
- What should be the outcome of the meetings to call it successful?  
*[What are the success criteria of your meeting? Are you trying to achieve too many things in a single meeting?]*
- Who all should be the part of this meeting, and what are their roles?  
*[Are all those participants required? What will be their participation level, and how will they contribute to the success of the meeting?]*
- Can I use any diagrams, techniques, and aids to increase the chances of meeting a success?  
*[What if I share the Business Process Flow diagram before the meeting itself? How about having a brainstorming discussion? Won't it be great if we have a projector? ]*
- What should be my mode of meeting to encourage maximum participation  
*[Should I book a conference room and ask everybody to come? Will a phone call do since the participants are dispersed? Do I need a video conference so that participants can see what I am presenting? ]*

Now, while you are listing down the meeting agenda, it's worthwhile to see whether the same purpose can be achieved without holding a meeting at all?

For instance, – You would like to get the opinion of client stakeholders on the new website design and finalize one of the three design options. Now, although you might be tempted to hold a meeting to finalize a design but the same objective can be achieved by other means as well - Send an email to all the stakeholders with the three design options, ask them to vote, and request feedback as well. You can collate the voting results and share them with everybody.

The benefit you ask?

Rather than spending 1 hour for each of the stakeholders, the same outcome can be achieved by them spending just 20 minutes of their time. Not only that, the stakeholders will be more careful and thoughtful about what they write in the feedback rather than just a cursory comment.

We have included an Agenda template that you will find very useful in ensuring that your meetings achieve their objectives. Such Agendas should be shared with the meeting attendees well in advance and should be reviewed at the end of the session to validate whether the objectives of the meeting have been successfully met.

## (B)ook

Once the agenda is all planned and defined, it's time to book the necessary arrangements and logistics. Make use of the following chart to prepare yourself and your attendees for the meeting:

Tasks	Tips
Confirm time and availability	<ul style="list-style-type: none"> <li>- The first thing is to ensure that all the key attendees can attend the meeting by confirming the time and their availability</li> <li>- This should be done by sending an email to all the required attendees containing the meeting date and time slots and asking them to pick one or two slots</li> </ul>
Booking Room (Physical or Virtual)	<ul style="list-style-type: none"> <li>- Before you communicate with the attendees ensure you have booked a meeting room or created the meeting in case you are meeting virtually</li> <li>- Ensure everyone is comfortable with the room</li> </ul>
Booking Logistics	<ul style="list-style-type: none"> <li>- Ensure the room has proper seating arrangement, acoustics and lighting</li> <li>- Book any equipment you require like a projector, whiteboard, charts, etc.</li> </ul>
Sharing Invites and Agenda	<ul style="list-style-type: none"> <li>- Share the invite to the meeting clearly defining the date, time, and meeting agenda document.</li> <li>- Also, include any other document you would want the attendees to go through before they attend the meeting</li> <li>- The role of each attendee should be clearly defined along with the responsibilities expected from them</li> <li>- Invite should be shared at least two days in advance of the meeting</li> <li>- Request all the attendees to confirm their availability</li> </ul>
Confirm Attendance	<ul style="list-style-type: none"> <li>- If you are hosting a new meeting, its best to confirm the availability of the critical attendees by sending an email or a phone call</li> </ul>

You should also encourage the attendees to clarify any questions about the agenda or their roles/responsibilities well before the meeting starts to avoid any confusion during the actual meeting.

## (C)onduct

This section covers how to facilitate and coordinate the meetings. For better comprehension, I have divided it into points:

1. Start the session on time, even if some of the members are late. This way, you are respecting everybody's time and discouraging late participation.
2. If the participants are meetings for the first time, break the ice by having a round of introduction so that everyone can put a face to the names.
3. Open the meeting by explaining the meeting agenda, the timeframe, and ensure everyone is clear with the meeting objectives. In case it's a follow-up meeting, the action items from the last meeting should also be mentioned.
4. Communicate the participation expectations from the attendees so that they are prepared as well as the meeting ground rules/protocols (respect speaking time, don't cut others short, etc..) to be followed.
5. Request attendees to put their digital devices on the silent mode and divert the desk phones (if any).
6. Take one agenda at a time starting with the priority levels and encourage the respective presenter to present the details/views/facts
7. Know how to deal with different types of participants, namely:

Participant Behavior	Characteristic	Management Style
Dominating	A know-all attitude and tries to enforce decisions	Request them to allow others to share their views

Introvert	Shy and unsure about their thoughts and ideas	Encourage them to participate and ask questions
Pessimistic	Finds faults in every decision and is always in doubt	Discourage their negative points and counter them with the positive aspects
Creative	Looks at things from a fresh perspective and suggest ideas	Applaud their inputs and ensure they remain within the context of the agenda
Deviating	Rambles and takes discussions off tangents	Politely ask them to follow the defined agenda
Optimistic/Agree to everything	Hard-working and have a positive attitude	Use them to gain support from others but ensure they are not over committing
Rushing	Gets tired of listening to others and jumps discussions	Should be asked to be patient and help reach decisions with everybody's consensus

Essentially, the group dynamics should be hospitable enough to have a healthy discussion, and the Business Analyst should be a mediator and controller.

8. Business Analysts should ensure that the group comes to a consensus or a conclusion and should re-iterated the same if the discussions seem to lose focus. Also, he/she should ensure that the decisions being made are as per the project requirements/business case.
9. The tools or diagrams should be made full use of as they increase comprehension and stimulate thinking.
10. If the attendees are participating by having open conversations, conflicts are bound to happen - Manage them diplomatically and tactfully.  
You may find some of the tips below quite helpful:
  - Don't avoid conflicts as usually they are too evident to avoid, and if you could sense that, so do others. In turn, recognize them during the call by stating something like, "We see there is a disagreement here and would like to resolve it".
  - Try to find the cause of conflict by asking each party to clarify their viewpoint
  - Then, help each of these parties see the other's viewpoint



- Request Optimistic members to act as mediators and try to resolve the differences as a team
11. The BA should keep a regular eye on the time duration of the meeting as well as the meeting agendas and ensure a balance is maintained throughout
  12. If the closing time is coming near and the BA sense that some items may be left, he/she should try to pick up the speed rather than postponing those agendas. Always end the meeting on time and that too on a positive note.
  13. In the end, all the participants should be thanked for their time, and the meeting agendas should be quickly reviewed for their completion
  14. The action items about who needs to do what should be identified well within the meeting timelines.
  15. In case a follow-up meeting is required, the BA should communicate the need for such a meeting and let the attendees know they can expect communication about the same.

## **(D)ocument**

It is essential to document the critical discussions, decisions, and the actions items of every meeting, in the absence of which the whole purpose of the meeting will be lost.

Now, there are different ways for the BA to do that, like recording the meeting and later playing and taking notes, asking for a scribe for help to jot down the points. However, each of these methods has a demerit as you may not always be able to find time to listen to the complete recording and take notes, or your scribe may not take relevant notes as he does not have the full context of the meeting agenda.

Thus, the best method is the BA taking the reign in his hand and take crisp, lightweight, and relevant notes throughout the meeting. Such a technique not only helps the BA to remember things later, but it sharpens his/her focus, and he/she may find some aspects/questions while otherwise would have gone unnoticed.

Let me take you through some of the best practices to do so.

1. Always take notes on a notepad or a piece of paper and never on laptops – No software will give you the liberty to write, draw, annotate, sketch and connect all these at the same time. Also, with only the pen and paper in your hand, you will be less distracted and will still be able to make eye contact with fellow attendees.
2. Since all the conversations will happen around the agendas defined by you, the first thing is to mention the agenda number against your note.
3. Next, mention the name of the speaker as well against your note.
4. Try to encapsulate the sentence or paragraph with just a couple of words and have only the critical points in your notes. E.g., if Mike says, *“I believe we should go for an external document management tool rather than saving all the documents in our local drives. Such a tool will allow everyone to access the same document version, quickly collaborate, discuss and make decisions within the tool itself. Also, it goes unsaid that such a tool will be much more secure, and we can configure access based permissions on the documents and repositories”* – all this can be summarized as Agenda 3, Mike, Prefers external document management tool.
5. A time-tested technique for note-taking is mind mapping, and its best for brainstorming and idea generation type of meetings. Here, only one agenda is allowed per page, and it is written in the center of a page. Next, all discussions, ideas, and points branch out from the central agenda, and the BA is free to make associations, relations between the concepts by drawing lines and shapes. Also, if you are a creative or a visual person, you can even use different colored pens to jot down various kinds of ideas.
6. A BA should use some shorthand, acronyms, and mnemonics to save time. Some of the widely used throughout the software development industry. Like:
  - s/w – Software
  - h/w – Hardware
  - RnD – Research and development
  - dev. – Development
  - ack – Acknowledge
  - f/w – Forward
  - alt – Alternative
  - func – Function

Also, the BA might make some of his shorthand or mnemonics (as I did for this chapter, remember ABCDEF?)

7. Once the meeting is over, the BA should review, summarize, and organize the notes, ensuring that the records are properly segregated when the conversation is still fresh in your mind. All this will become the meeting minutes that you are expected to share post the meeting is over (more on that ahead).

## **(E)xchange**

With the notes ready, it's time for you to exchange and share all that you have documented with the attendees of the meeting.

Meeting minutes is an excellent way to permanently preserve the conversation and decisions that have taken place during the meeting and refer them in the future. The minutes also help other attendees catch up who were not able to attend the meeting. Also, since the minutes contains the action items against the meeting attendees, it helps in future follow-ups against those very tasks.

The meeting minutes and action items should be sent in an email, preferably the same day and not later than two days after the meeting end date, or else the attendees may fall behind their action items. Also, the minutes, as well as any relevant documents against the meeting items, should be stored in a shared location or repository so that any member can access the same in the future.

We have the “meeting minutes” template along with these lessons that you will find very useful in implementing the best practices of managing meetings as well as documenting and sharing the notes that you have prepared while attending the meeting.

## **(F)ollow**

The last and the final step of effective meeting management comprises of the business analyst following up with the attendees about the action items pending on their names.

The business analyst should send separate emails to the attendees to ask about the status of the action items and enquire if any attendee needs any help or clarifications

that the BA can provide or facilitate. Then, the BA should send another email when the deadline of the action items is coming near, this time reminding them about the due date and accordingly updating the same in the meeting minute's template.

In case there is a delay in completing any of the items, the particular reason should be furnished in the template, which can be analyzed for its root cause so that the same can be avoided in the future.

And, with this, we conclude the lesson. Don't forget to check the templates that are available with this lesson to reinforce your meeting management knowledge and practice the tips we have learned in at least 4-5 meetings before they come naturally to you.