

Conducting (REALLY) Effective Meetings

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FROM THOUGHT LEADERSHIP
TO CLINICAL PRACTICE



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Learning Objective

- a. Identify and describe the 7-Step process in conducting effective meetings.
- b. Explain how agreements support meeting participants and the meeting process.
- c. Plan your next meeting.
- d. Explore and practice strategies for keeping everyone engaged and the meeting on track.



The 7-Step Process

1. Clarify Objectives (goal of the meeting)
2. Review Roles
 - Leader -- Recorder -- Timekeeper -- Facilitator
3. Review Agenda
4. Work Through Agenda
5. Review Action Items/Meeting Record
6. Plan Next Steps/Next Agenda
7. Evaluate Meeting

Do steps 1 – 3 now



Introductions

1. Form pairs.
2. Introduce yourself and identify 2 – 3 challenges you experience in your meetings.
3. List the challenges identified.
4. Select a spokesperson to report out.



Why meet?

1. To advance the work.
2. To develop the team.
3. To clarify direction and expectations.
4. To solve problems.



Meeting Agreements (ground rules)

1. Agreements about group behavior for the purpose of improving effectiveness, inclusion and creativity.
2. Determined by the group.
3. Provide a framework to keep the meeting on track.
4. Posted on agenda and reviewed periodically.



Agreements for this meeting/training

1. Start and end on time (or early).
2. Be present and actively engaged. Avoid multitasking.
3. Hold one conversation at a time. Actively listen.
4. Others?



Select Agreements for your meetings

1. Using the handout, select 3 – 5 agreements that you would like to see implemented in your future meetings.
 - Recall the meeting challenges – what agreements could resolve/reduce these?
2. How will you introduce them to your team?



5 Minute Meeting Planner

- What is the goal of your meeting?
 - How will it advance the top priorities?

- What will we do in the meeting to achieve the goal?
 - Discussion? Presentation? Demonstration? Brainstorming? Prototyping? Other?

- Meeting Agenda



Engage the team

1. Make sure there is a good reason to meet.
2. Prepare thoughtfully.
3. Determine roles.
4. Reinforce meeting agreements.
5. Plan for logistics (equipment, space, food, etc.)
6. What else?



Strategies to keep your meetings on track



What are your next steps?

1. What decisions have you made?
2. What action items have you identified?
3. What will you do differently for your next meeting?



Evaluate this meeting/training

PLUS 

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What worked well today?

What can be improved next time?

