

## **Possible Titles for Session:**

- ⌘ Minutes, Meetings, and Manners
- ⌘ Podium Protocol
- ⌘ Presenting Yourself Positively
- ⌘ Just a few Minutes...
- ⌘ Mastering Meeting Etiquette

## **Length of Session:**

There is sufficient knowledge material in this lesson plan to present a half-day session on meeting and protocol etiquette. Supplemental information that could be added to increase the workshop length to a full-day is also included. Trainer should review the entire content and then pick-and-choose the material that best fits the needs of the client and the audience.

## **Sample “Sell” Segment:**

Have you sat through one too many long, unproductive, unnecessary meetings? If you are fed up with meetings that waste time, drain energy, and deplete morale, this workshop is for you. Join Canada’s Etiquette Experts and learn tips and techniques for determining when meetings are necessary, organizing meetings, and facilitating meetings that are efficient and productive.

## **Who Would Benefit From This Session?**

Leaders, managers, human resource professionals, public speakers, trainers and facilitators; anyone who wants to improve the quality and impact of meetings or anyone who wants to present on business topics and/or speak in front of others in a more effective, confident and credible way.

## Knowledge Material

### ORGANIZING MEETINGS (30–45 minutes)



Trainer asks participants, “Why do you go to meetings?” and “Why do you call/schedule meetings?”

After participants have had an opportunity to respond (maybe trainer could write responses on a flip chart or white board), trainer continues by discussing the following:

Once you have determined the appropriate meeting style, e.g., web conference, teleconference, video conference, or in person, you can begin to arrange the details of the meeting. Initial planning requires thought and preparation. The following details must be addressed:

- ✂ Identify all those that must be at the meeting.
- ✂ Decide who will be the chairperson or presiding officer.
- ✂ Decide who will record the proceedings of the meeting and prepare the official summary or minutes (the meeting secretary or designate).
- ✂ Choose a suitable location for the meeting. Is the lighting good? Is the room clean? Is there a clear view of the speaker for all participants?
- ✂ Decide on the date and time that the meeting will take place.
- ✂ Acquire all the materials and resources required for the meeting, e.g., audiovisual equipment, copies of previous minutes, flipcharts.
- ✂ Write and distribute the meeting agenda, including:
  - ▲ date
  - ▲ start and end times

- ▲ location
- ▲ names of participants
- ▲ purpose of the meeting
- ▲ topics to be discussed
- ▲ person responsible for leading discussions
- ⌘ Confirm attendance, e.g., by telephone, e-mail or fax.

Once your initial planning is done, concentrate on the agenda. Important points to remember are as follows:

- ⌘ Ask for input of agenda items from those who will be attending.
- ⌘ Order the items on the agenda. The most important ones are discussed first.
- ⌘ Look for logical connections between agenda items and schedule them together.
- ⌘ The agenda should be specific as to its purpose so participants can be prepared with information for the meeting.
- ⌘ List the time of the meeting, both start and finish, and the date and location.
- ⌘ Decide if there has to be a minimum number of people present at the meeting (quorum) to deal with issues.
- ⌘ Set out the rules according to your organization policy or formal meeting rules.

The last step in organizing a meeting is to inform the participants.

- ⌘ Circulate the agenda so that everyone is aware of the topics to be discussed and possible information that may be required from them during the meeting.
- ⌘ Distribute previous minutes and appropriate documents needed by participants in order to prepare to discuss agenda items.

## Knowledge Material

### TIPS ON TAKING MINUTES (15–20 minutes)



Trainer suggests that whether you are officially the designated meeting minutes taker or not, you should be able to make meaningful meeting notes that you can refer to at a later date. At the very least, meeting attendees should be able to skim their own notes or the meeting minutes and determine quite quickly (and with some clarity) what, if any, action is required of them.

Who ever is organizing a meeting should have an agenda that is circulated in advance of the meeting with preparation items indicated for attendees. Generally an agenda would include:

- ⌘ Listing of who is attending
- ⌘ Date and location of the meeting
- ⌘ Objectives – what the meeting chair hopes to accomplish
- ⌘ Topic for discussion/reason for the meeting
- ⌘ Timeline/breakdown describing who is talking about what and when

Add-on documents for meetings could include:

- ⌘ Background information
- ⌘ Bios/relevant information about presenters/speakers
- ⌘ Details about items that are required to be prepared in advance of the meeting

*\*\*\*Don't forget to bring extra copies to the meeting.*