SUCCESSFUL BUSINESS MEETINGS

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Ruth

For proving

how rewarding a meeting can be
I

INTRODUCTION

Meetings are a common part of our professional experience. Yet, there are few occasions, if any, when we're actually shown the ropes about this essential aspect of doing business.

The present booklet attempts to remedy this situation by providing you with a clear concept of what a meeting is, discussing ways in which you can plan and conduct your own meetings more successfully, and suggesting how you can be a more effective participant in meetings that others call.

Definition. In general terms, a meeting is "a coming together for a common purpose."

The idea of coming together seems pretty obvious. If we want to have a meeting, all of us have to move from where we are individually to some communal spot where we can do what has to be done. So movement is a key element in the concept.

But physical movement is not the prime requisite. Thanks to conference calls, videophones, and the like, people can remain geographically distant from each other and still have a coming together for a common purpose. The really important movement in our high tech era is the coming together of minds!

A meeting, then, is a vehicle of movement designed to transport our minds from where they independently were
before, to a new place: a mental space which it is hoped all of us will occupy communally after the meeting.

While meetings can produce movement in the realm of ideas, they can effect movement on the emotional level, also. When they are well run, they can develop enthusiasm, buoy the spirits, and significantly raise morale. So if you manage to move people on both these planes -- the mental and the emotional -- you'll know that you've conducted a really successful meeting.

A word of caution, though. If meetings are vehicles that convey people from one place to another, they are vehicles that are enormously complex, extremely delicate, and often quite unpredictable. Sitting at the controls of a meeting is not for everyone. It's much like sitting at the controls of a rocket: you can go a long way if your conveyance is well-made, if you have a first-class support team behind you and a super crew at your elbow . . . and if you know exactly what you're doing. Just remember, however, that when steering a meeting, you'll be perched atop a very volatile mixture -- one that can take you into marvellous new regions, it's true, but one that can also give you some jolting surprises if you're not exceptionally careful and very well prepared.

When to call a meeting: Goals and objectives. If you're adventurous enough to place yourself at the controls of a meeting, you'd do well to define your goals and objectives from the start. An "objective" is a tangible, immediately obtainable end. A "goal" is a more long-range target -- one which can only be attained by prolonged effort. We might say, for example: "The objective of this meeting is to create a foolproof marketing plan that will help us attain our ultimate corporate goal of surpassing all competitors in size, profitability, and consumer confidence."

When you think of calling a meeting, you must specify what your objectives for the meeting are: informing someone about something, finding out something, working out a
problem, reaching an agreement, motivating people, breaking an impasse. If these are your objectives, then a meeting might be the way to go. Let's see why.

OBJECTIVE #1: TO INFORM. Although information can be effectively transmitted by written media -- memos, letters, reports, etc. -- there are times when it's not sufficient to move information in this way. For example, if we send copies of a directive to all Department Heads, and leave it at that, we'll never know if they have a common understanding of the directive, if they have a common appreciation of its importance, and if they're fully aware of its implications. By calling a meeting, though, we can make sure that everyone's mind is together on these points.

But intellectual togetherness is only one element of importance to us. We also want everyone to have a similar emotional grasp of the situation, a "feel" for the matter ... which can't easily be conveyed through words on a piece of paper. By calling a meeting -- by being in the presence of those other people -- we can get our point across with the help of more than words. We can use vocal qualifiers such as tone of voice, emphasis, and pacing. And we can use physical qualifiers like facial expression, hand gestures, and overall posture. So informing people through a meeting can be much more effective than merely sending information to them on paper.

And holding a meeting has advantages over phone calls or a few words to each person in the corridor. By holding a meeting, you save that priceless commodity, time. You say your piece once rather than often. What's more, you deliver your message to everyone under the same conditions. This helps you make sure that everyone has a similar perception of your message.

OBJECTIVE #2: TO FIND SOMETHING OUT. The second reason for calling a meeting--to find something out--is like the first, but from the opposite viewpoint. Sometimes
the dynamics of a meeting help you learn much more than you could ever learn from individual written and oral communications. Seeing your people working together on an issue, watching them interact, hearing the subtleties of their give-and-take can be of immeasurable value to you as a planner and decision-maker. If this is your objective, then calling a meeting might be clearly justified.

OBJECTIVE #3: TO WORK SOMETHING OUT. When a serious problem confronts you, there's a resource of immense value right at your fingertips: the uniqueness of the people you direct. Each person has singular sensitivities, aptitudes, skills, and experience. By focusing each person's strengths on the problem at hand, you can vastly increase your chances of finding a good solution for that problem.

Please note, however, that good solutions come most quickly when people work alone first, and then work together. This is true because when they work alone, they apply their strengths directly to the problem with no interference. When they start by interacting, on the other hand, the contributions of colleagues tend to detour them from the path they would naturally have followed if left to their own devices. This means that if there's any brainstorming to be done, it will be most effective after each person has addressed the issue individually.

OBJECTIVE #4: TO REACH AN AGREEMENT. Another valid reason for calling a meeting is to reach agreement in situations characterized by a diversity of opinion. The most binding agreements, of course, will be those hammered out by the people who are critically affected by them. Even when a person holds a position that differs from the majority's, he'll tend to go along with the others if he feels he's had a fair hearing and was treated with dignity. So if you want to reach an agreement that will hold water, solicit input from all parties who have a direct stake in the matter and treat everyone's opinion with respect.
OBJECTIVE #5: TO MOTIVATE. Most organizations have people who don't always apply as much energy to their tasks as they might. If this is the problem in your organization, calling a meeting might be the solution. The key to success, however, lies mainly with you -- not with the employees. You have to be able to convince them that they'll reap unmistakable benefits from putting more enthusiasm into their work. If you can show them what they've got to gain, their team spirit will increase ... and so will their output.

OBJECTIVE #6: TO BREAK AN IMPASSE. Occasionally, action gets bogged down in the system. This happens for a variety of reasons. Sometimes someone is reluctant to make a decision he feels will be unpopular. Sometimes someone has a psychological block and can't make a decision. Sometimes there's a conflict along the way and this holds up the works. If these are the types of problems you're facing, you might be able to get things moving again by calling a meeting. Just be sure, however, that no one comes away from that meeting with a sense of having been publicly reprimanded or rebuked. When you point the finger at people in front of others, you assail the most sensitive part of their being: their self-esteem. This is one of the most destructive things that can be done in the workplace. So play it safe. Don't attack those you work with, for sooner or later, the barbs you throw against them may boomerang and do you harm. Rather, be creative and find ways to make your people look good. That will overcome obstacles to progress faster than anything.

To summarize, then, the way to start planning a meeting is by determining your objectives. The indispensable tool for recording your ideas is the Meeting Planner which is found in the Appendix. Fill out the *Objectives* section as completely as you can. That way, you'll reduce the risk of rambling aimlessly or forgetting to include key subjects. Of course, as you get into the details of the planning process,
you may modify or even change your objectives; but it's always wise to have specific ends in mind when you begin.

**When to avoid calling a meeting.** In spite of the fact that you think a meeting could help you reach one or more of your objectives, and even advance you toward some important long-range goal, it might be to your advantage not to call a meeting. For example, as you examine your particular situation with the aid of the *Meeting Planner*, you might find that there are alternatives which will accomplish your ends quite satisfactorily. Among these are:

- Written communications (memos, letters, reports, newsletters, questionnaires, and the like);
- Oral communications (a well-timed phone call, a few words face-to-face in the coffee lounge); and, of course,
- Direct action (that is, the judicious exercise of power as assigned to you in your job description).

If any of these alternatives is truly satisfactory, don't complicate matters with a meeting!

**When to postpone a meeting.** If you find no satisfactory alternative and are convinced that a meeting should be held, there might be good cause to wait a bit before you call it. As your *Meeting Planner* indicates, it's prudent to postpone your meeting if any of the following conditions apply:

#1: INSUFFICIENT SUBSTANCE. This means that there's not enough significant content to warrant the disturbance that a meeting causes. Lack of substance makes meetings either too short or too long. If they're very short, it's hard to convince people the interruption in their work schedule was justified. And if they're very long, the participants will get bored and ultimately bad tempered. So before you call a meeting, make sure there's enough grist for the mill.
#2: INSUFFICIENT PREP TIME. It's also wise to delay calling your meeting if you, as leader, or those you intend to invite, have insufficient time to prepare. Thorough preparation by everyone who's involved is the key to success as far as meetings are concerned. Therefore, if you or anyone else lacks enough prep time, postpone the meeting until you're sure everyone will be ready.

#3: KEY FIGURE(S) ABSENT. A meeting is justified only when all the key figures can be present. By "key figures" is meant those persons who have information that no one else at the meeting will have; those whose approval might be needed before decisions can be taken; those who'll be expected to carry out decisions reached at the meeting; and those who hold opposing views -- i.e., people who might cause trouble later if not given a chance to participate in the decision-making process from the very beginning. The absence of any of the above is good reason to postpone your meeting.

#4: DISCORD ANTICIPATED. If you expect that destructive controversy will erupt, it's prudent not to call a meeting now. The best thing to do is delay the meeting until the situation cools down on its own or until you can personally cool it down through the use of deft, behind-the-scenes diplomacy.

#5: INCONVENIENT DAY/HOUR. No one likes to have important meetings immediately before or after a long weekend, right after lunch, or just before quitting time. To oblige people to attend meetings when they aren't disposed to give their all is just not sound business practice. Therefore, insofar as possible, put your meeting off until you're sure it will fall within everyone's prime time.
The agenda. As soon as you're convinced that a meeting should be called without delay, it's time to fashion your agenda. An agenda is a list of things to be done. The word is derived from the Latin *agere*, 'to do,' 'to drive' -- the same verb that gives us words like *act, action, active* in English.

An agenda, then, is not something static. It implies energy, motion, dynamism. But these factors are not random. They're very purposeful. If there's energy, it's designed to drive you toward an objective. If there's motion, it's forward motion. If there's dynamism, it's controlled, directed.

In a meeting, an agenda is an instrument that the chairman uses to keep things going. It's his indispensible tool for organizing time, energy, and resources to attain the objectives he has in mind. But an agenda is not only of value to the chairman. It's also of value to the participants. It enables them to put their thoughts together and prepare their role in the meeting. It tells them when they'll be principal actors, when they'll be playing bit parts, and when they'll be audience at someone else's performance.

What to include in the agenda will vary with circumstances. Among the factors that affect content are: your *objectives* in calling the meeting, the kind of *topics* you plan to deal with, and the *people* you'll invite to participate.

Most agendas look pretty routine. They begin with a
reading of the minutes of the previous meeting, proceed with
a discussion of business arising from the minutes, and end
up with a consideration of new business. Although all of
this seems straightforward and logical, it often happens that
what's on the agenda, the order in which topics are dis-
cussed, and the people chosen to participate in the discussion
are determined by a logic that's not apparent to everyone. In
other words, there's a hidden agenda beneath the surface
of the matter-of-fact looking program of events that every-
body receives prior to the meeting.

The hidden agenda is a product of subtle motivations.
Often, its purpose is to advance the meeting planner and
other favored individuals toward achievement of their
personal goals. Depending on the loyalty, integrity, and sen-
sitivity of the meeting planner, this may have positive or
negative consequences for the organization. The results will
be negative, if the hidden agenda aims only at promoting
private causes. The results will be positive, if attainment of
personal goals is treated as a means of motivating people to
work more enthusiastically and more efficiently for the
attainment of organizational goals.

First steps. When planning your agenda, the first step is
to make a list of all the items you think it might be appro-
priate to deal with at the meeting. Turn to the Agenda
Organizer (see Appendix) and, in the space marked
"Topics," write down whichever subjects come to mind.
Don't bother to put these subjects in priority order. Just
make a non-prioritized list.

Once your list is as complete as possible, you should do
a detailed assessment of all the topics on it. Which are the
mandatory ones -- the ones you must include? Which are the
optional ones? On your Agenda Organizer, put a check
(✓) in the M column if the topic is Mandatory. Check the O
column if it's Optional.

How about the complexity of each item? This is a very
important consideration, because the more complex a subject
is, the more time will be needed to deal with it. So indicate the complexity of each topic by writing "High," "Med." (Medium), or "Low" in the Comp column of your Agenda Organizer.

Using complexity as a guide, try to estimate how long it might take to discuss each topic if conditions were ideal. Simply enter your estimate, in minutes, in the ET column. The Total Estimated Time for all topics will give you a rough idea of how much of your non-prioritized agenda can effectively be dealt with in the time you have available -- or want to make available -- for the meeting.

Conditions, however, are seldom ideal, because topics don't discuss themselves. People discuss them. And people, behaving as individuals and as members of an interacting group, can have a profound effect on the time needed to deal with a given subject. Consequently, before you can determine which topics to include and what the Final Agenda Sequence will be, you must take an in-depth look at those who will attend the meeting.

Participant review. The success of your meeting will depend to a very large extent on how conscientiously you fill out the Participant Review Form which is shown in the Appendix. You'll want to answer questions such as the following:

- Which people must be invited to the meeting?
- Why must they be invited?
- What are each person's technical strengths and weaknesses?
- How well prepared will each one be on the subjects you'll be discussing?
- What positions can each one be expected to take on issues that will probably arise?
- What power base does each person have in the organization? (Power comes from position in the chain of command and also from the alliances and relationships an individual forms with others. Re-
member, the low man on the totem pole may have friends in high places, so his word may carry much more weight than his rank alone would suggest.

- What are the personal goals of each of the potential participants and what tactics do they generally use to reach those goals?
- What personality traits does each of your people have? (Who will be late? Who will tend to leave early? Who will try to monopolize the discussion? Who will be seen but not heard? Who will be intrinsigent? Who will yield on practically everything? Who will stick to the issues? Who will go off on tangents?)
- What effect is the presence of these people likely to have on the meeting?
- Which other persons could be invited? What do you know about them? What kind of an impact might they have on your meeting?

Everyone has his guiding passion, his central concerns, his ideal of happiness, his keys to propriety and justice. And it's essential for the meeting organizer to search for these governors of human behavior. But beware of typecasting. In the world of business, typecasting is both unjust and unsound. It tends to reduce human complexity to oversimplified formulas. Such formulas rarely function well. Not only are they essentially unrealistic, but if looked at honestly, they're often merely projections of yourself -- reflections of your own inner governors. Therefore, you'd be wise to study your people on a continuous basis. And as you do this, take note of the fact that you, too, are a participant in your meeting. For this reason, you should also make yourself the object of continuous assessment.

Try to see yourself for what you really are . . . not only as an individual, but also as a meeting chairman -- a person who occupies a special position in the organizational hierarchy: a person who is between those above and those
below. As you walk the tightrope your position has decreed, it's essential that you maintain a very careful balance. If you go too far to satisfy those below, you'll lose support from those above, and this will precipitate your downfall. And if you cater too much to those above, you'll lose support from those below. In the long run, this will just as surely cause you to tumble from your position.

If Rule #1 of participant selection is "Get to know how each person -- including yourself -- might advance or retard the progress of the meeting," then Rule #2 is "Insofar as possible, adjust the number of participants to the complexity of the subject matter." If your aim is to help raise morale by giving a lot of people an opportunity to take part in the meeting, you should choose agenda topics of low complexity. However, if your objective is to solve a really intricate problem, you would be well advised to keep the number of participants to a minimum. This is true because, as more people get involved in the discussion, the less of a chance each person will have to make significant contributions.

Of course, it sometimes happens that you find yourself confronting a tough problem in a meeting with a lot of participants. If this occurs -- and it can, despite even the most adroit planning -- one of the wisest things you can do is to form a subcommittee before the discussion gets hopelessly bogged down. The advantage of a subcommittee is that it's representative of the group as a whole, but it's small enough to work efficiently.

By keeping considerations like these in mind and conscientiously using the Participant Review Form as a planning tool, you'll develop a more accurate idea of how each person might help you -- or hinder you -- as given topics are discussed. This, in turn, will enable you to draft an agenda with a higher success potential than might otherwise be the case, for your topics and participants will be judiciously selected and will be appropriate for the occasion.

Structure and pacing: A case study. One of the
principal aims of a chairman is to organize the meeting in such a way that events take place in the most favorable sequence possible and at a pace that's satisfactory to everyone.

Suppose you're the Head of Sales in a highly competitive electronics company. Research and Development has come up with a very promising new product and you'd like to put together a first-rate marketing plan for it. As part of your task, you must decide on how best to launch the product. Thinking the situation over, you realize that no matter how spectacular your launch will be, there's no substitute for commitment to the product on the part of every member of the sales team. You also know that next year's budget must be submitted one month from now, and that if you could get the Vice President of Finance behind the product, you'd be assured of the funds necessary to mount a proper sales campaign in the months ahead. Finally, at the back of your mind is a comment the Head of R & D recently made concerning rumblings by his staff about how little recognition higher-ups in the Company give to those who "really do the work."

These considerations lead you to put down the following objectives on your Meeting Planner:
- Decide on how to launch the new product.
- Inform the VP about the product and get his support behind it.
- Generate enthusiasm among those who'll be directly involved in selling the product.
- Help colleague in R & D reduce disaffection in his Department.

After carefully examining the situation, you conclude that these objectives could best be achieved by a meeting and that nothing would justify a delay. The time you select is 9:30 a.m. next Wednesday.

Logic tells you that the following topics should be discussed at the meeting (with Estimated Times in parentheses):
- The nature & importance of the new product (ET 7 mins).
- The admirable service that the creators of the product have rendered to the Company by developing something so unique (ET 3 mins).
- The benefits that are expected to accrue to each member of the sales staff by diligently promoting a product of such great usefulness, which no competitor will be able to match for some time to come (ET 10 mins).
- The dramatic effect that this product will have in raising Company profits over the next few years (ET 3 mins).
- How to launch the product on the market (ET 35 mins).

At this point, your total estimated time -- 58 mins -- is based solely on your impression of the nature and complexity of the subjects to be dealt with and on the conviction that your meeting must be well-paced. This means you must move briskly enough to avoid boredom, yet not so quickly that the group will feel rushed. When participants in a meeting get bored, they go off on tangents; and when they feel rushed, they become resentful about not having a chance to voice their opinions fully. This latter consideration suggests that you should build enough slack into the system so that you can run over your estimate on occasion, without exceeding the total time you've allotted for the meeting.

To a certain extent, of course, the length of the meeting will be determined by the people who participate in it. You decide to address that subject now. First off, you must invite the Heads of the R & D and Public Relations Departments, and, needless to say, the Vice President of Finance. These key figures will permit you to dispatch essential business quickly and efficiently. However, you won't be able to accomplish all of your objectives as thoroughly as you'd like, unless you invite some others, as well: namely, the two imaginative, but disgruntled R & D people who
created the product; a couple of dynamic members of your own Sales Department; and finally, the two people in Public Relations who'll be assigned to develop the promotional campaign. Counting yourself, there will be ten at the meeting.

With the aid of your Participant Review Form, you try to anticipate the effect that all of these people will have on the meeting. Aside from having to add ten minutes to the discussion time because of the verbosity of the Head of R & D, the only problem you discern stems from the fact that the VP is habitually 15 minutes late to all meetings. This will have a direct effect on how you structure your agenda. You reason as follows:

Since your Committee is task-specific, there will be no minutes of a previous meeting to read or old business to discuss as you wait for the Vice President of Finance to make his appearance. Although logic tells you to start by having the creators of the product explain its merits (and theirs), you think that, for political reasons, it would be better to invite them to do that later, when the VP is present. In this way, you could demonstrate quite forcefully to them that the higher-ups are not reluctant to give credit to those who "really do the work."

Your postponement of the Research and Development people's remarks, however, has a serious drawback: no one in Sales will have enough information about the product for you to open the meeting on a motivational tack. That cuts down your options considerably -- and all because of the VP's habitual tardiness. Fortunately, when you look at the people in Public Relations, you see a way to get around the problem. They'll be ideal as meeting openers. First, they'll be able to provide the group with general information about their past successes in launching products. That will get the meeting started on a positive note. Second, they won't be distressed if the VP doesn't hear their initial remarks. Unlike the R & D people, they're very self-assured and don't have morale problems. And anyway, there's no chance
they'll get shortchanged in the credit column: knowing them, you're convinced they'll score plenty of points later in the meeting when the issue of the new product comes under discussion.

In light of this, you send a memo to the Head of PR, informing her that you'll be chairing a New Product Meeting next Wednesday at 9:30 a.m. In your memo, you indicate that everyone would benefit if she would bring the two staff members whom she has assigned to the promotional campaign, and if she herself would present a 10-minute report on product-launching techniques that have been successfully used by her Department during the last five years.

**Putting it together.** The structure of your agenda is now becoming much clearer in your mind. You'll begin the meeting with a 5-minute statement about the marvellous new product whose development has brought all of you together this morning, and you'll emphasize the need to launch that product in the most effective way possible (9:30-9:35).

From here you'll move to the 10-minute report from Public Relations (9:35-9:45).

By the time the report is finished, the VP will be present and you'll be able to invite the Research and Development people to explain the nature and importance of the product they've created (9:45 + 7 mins = 9:52; add 10 mins for the verbosity of your R & D colleague = 10:02).

You'll then be able to involve your two Sales Department members and fire up their enthusiasm (10:02 + 10 mins = 10:12; add 3 mins for good measure =10:15).

With Sales Department enthusiasm high, it will be logical to bring up the prospect of a significant increase in Company profits (10:15 + 3 mins = 10:18; add 2 mins for good measure = 10:20).

After this, you'll publicly congratulate the Development people for their excellent contribution to the welfare of the
Firm (10:20 + 3 = 10:23; add 2 minutes in case the VP wants to compliment them, too = 10:25).

Finally, you'll introduce the big question of the morning: how best to launch the new product (10:25 + 35 mins = 11:00).

Although the official notice will indicate that the meeting is scheduled to run from 9:30 to 11:00, you see advantages in ending it earlier. You decide to do this in the following way. At 10:25, you'll initiate a lively brainstorming session on how to launch the product. Once all the participants have had a say on the matter (by 10:45 everyone should have had ample opportunity to make their views known), you'll suggest that instead of going into further detail now, it might be more practical to form a subcommittee to work out the minutiae of the launch project. The subcommittee would be composed of the two Department Heads here present, and yourself as Chairman. You three will get as much input as possible from your respective staffs and will meet again next week at the same time to formulate a concrete plan for introducing the product.

Everything smooth and simple. And no surprises. Except that instead of running for 90 minutes, the meeting will last somewhere between 70 and 80 minutes -- a fact that everyone is sure to appreciate.

And there's another thing, as well. Working so intensively on the agenda has made you realize that you can't fashion a detailed launch plan at such a large meeting. In other words, what you originally thought would be the primary objective of next Wednesday's meeting is not going to be primary at all. If this is true, then what will the main purpose of the meeting be? The answer seems clear: to lay foundations for the future. Foundations such as budgetary support from the VP in the months to come; a good working relationship with the PR people upon whom you'll depend so heavily for the launch program; good will from your colleague in R & D; and finally, stronger Company allegiance on the part of workers whose creative efforts are
crucial to the welfare of the Firm and, through it, to your own.
III
ADDITIONAL PREPARATIONS

As was just shown, you would start planning your meeting by establishing specific objectives and long-range goals; selecting the topics to be discussed; doing an in-depth analysis of the participants; and organizing your topics in such a way that the agenda will help take you where you want to go, within the limits of a pre-set schedule.

These steps require a good deal of thought and a fair investment of time. Therefore, some people are tempted to stop at this point. But if you want your meeting to be really successful, you'll have to go further. You might look at it this way: being the Chairman of a meeting is like being the Producer and Director of a show.

The Chairman as Producer. The Producer is the person who puts together and supervises all the elements that make up the show. If the show is small, he'll probably do most of the work himself. But if it's a big production, he'll delegate authority to a number of subordinates. In any case, like the showbiz Producer, the Chairman of a meeting has a wide range of responsibilities. Among other things, he has to:
- Choose the best site for the production.
- See to it that the site is completely prepared for the event.
- Insure that all the right people will take part.
- Establish a communications network that effectively links everyone concerned in the production.
- Guarantee that the participants have all the materials they'll need to do their job successfully.
- Coordinate the preparations, so that the event starts on time, ends on time, and leaves everyone satisfied.
- And do all of this within a realistic budget.

The Chairman as Director. The Chairman's job doesn't end there, however. Before and during the meeting, he also acts as a Director. As we know, a theater Director must:
- Formulate an overview of the action.
- Make sure the actors and support staff understand their roles.
- Rehearse with the players so that they do their best when working solo or interacting with others.
- See to it that nobody misses a cue or upstages anyone else.
- And make certain that everything moves at the proper pace.

If you think about it, you'll see that the Chairman of a meeting does much the same thing.

Despite the fact that similarities exist between the responsibilities of a showbiz Director and those of a meeting Chairman, there are also important differences. For example, in the theater, the Director usually coaches the actors at formal rehearsals. The meeting Chairman, however, tends to coach his people in an informal way before the event. It might be through a memo. It might be by phone. It might be over lunch. But his coaching is done in private.

The Chairman must give direction in advance, because without direction the participants won't have a clear idea of where they'll be going. But he must be extremely discrete, very diplomatic, subtle, and sensitive, for the people he works with are not like actors at Stratford who rigorously follow a written script. Participants in a meeting are more like those versatile TV talk-show artists who enthrall so many of us with their astuteness and mental flexibility. Although they do a lot of preparation in advance and have a
good idea of where they'll be headed, once they get on stage they need plenty of freedom to respond creatively to the needs of the moment.

In summary, then, the greatest challenge a meeting Chairman faces in advance of his show is to guide everyone toward specific objectives, and in such a way that all participants turn in a first-rate performance when it's their time to act. The better the Chairman knows himself, his people, his material, and his theater, the better are his chances for success.

With so many variables, there are likely to be a lot of surprises. One sphere in which the surprises can be kept to a minimum and even eliminated, however, is the site where the meeting will be held.

**The right location.** No Producer or Director worth his salt would ever allow his actors to perform in an improper or inadequate space. Likewise, no success-oriented business would initiate manufacturing, sales, or service activities without first selecting an appropriate site for those activities. Nor would it fail to modify the site to meet the needs of the people supposed to work there. Unfortunately, many of the same individuals who put so much emphasis on *location* in the broader business context often fail to see its importance in the more specialized province of internal administration, and hold their meetings just about anywhere that happens to be available.

This booklet advances one principle for both contexts, the external and the internal: namely, that you can't get optimum results unless you do business in the best location. And the "best location" is the one that allows the largest number of designated participants to play their role in the business with the greatest possible comfort, efficiency, and good feeling. Let's see how this concept can guide you when planning a meeting.

**Know your requirements.** Our environment has a
marked influence on how we think, feel, and act. Therefore, when planning a meeting we should look for a site that will have a positive effect on the participants. Obviously, there's no such thing as the perfect place for a meeting. But if you have a clear idea of what your requirements will be before you set out to find a location, you'll come a lot closer to the ideal than you might otherwise do.

You can't be passive about site selection and hope to get optimum results. If you're going to do business in a place, insist on having a say in choosing that place. Try to avoid having some outsider impose a location on you. Only you know what you really need.

Of course, the more aware you are of your requirements, the easier it will be to select a site. To determine what you really need, you have to ask the right questions. Among the most important are the following, which form the basis of the Site Selection & Preparation Form shown in the Appendix:

- How many people do you plan to have at your meeting?
- What will the tone of the meeting be: formal, semi-formal, informal?
- What kind of seating will be required: straightbacked chairs, armchairs, sofas; seats that are individually movable or seats that are fixed in position?
- What kind of writing surface will be needed: a clipboard, a chair with tablet arm, a table for one or more people?
- Where will the participants be located when they speak: in their seat, on a stage, behind a lectern, at a free-standing microphone?
- Will you have information illustrated by means of a blackboard, a flipchart, posters, handouts, or audio-visual equipment?
- If posters will be used, how many of each kind will you need?
- If handouts are necessary, what number will be
required, when will they be distributed, and by what means?
- If audiovisual equipment will be needed, which kind will be most appropriate for the locale and the circumstances: a film projector, a slide projector, an overhead for opaque material or transparencies, a VCR? And what collateral equipment will be necessary for each device: an extension cord, a screen, a certain kind of table?
- What refreshments do you plan to have, and in what quantities? Who'll supply them? When and where will they be served? By whom?
- Will participants come to the meeting from outside the building? In other words, will you need special parking facilities, a cloak room or coat rack? If so, where do you want them to be located and whom do you want to attend them?
- Will provisions for the handicapped have to be made? That is, will you need special entry facilities, elevators, washrooms, and the like?
- How much do you want to spend or do you have available for all of this?

Assessing the site. Once you know what your requirements are, you can look for the best location in which to do your business. To determine how suitable a particular site is for your purposes, look at the following criteria and beside each one, give the location a score of "1" for good, "2" for average, or "3" for poor:

- Is it easy to reach? 1 2 3
- Is the space adequate for your needs? 1 2 3
- Is it free of impediments to visibility & audibility? 1 2 3
- Is its décor appropriate for the tone you want to establish? 1 2 3
- Does it have proper lighting and climate control? 1 2 3
- Does it have all the furniture and special features 1 2 3
you'll need?
- Does it have the requisite number of washrooms and the proper kind of kitchen, bar, storage, and parking facilities? And are these easily accessible? 1 2 3
- Does it allow users to communicate with the outside to the degree that's necessary? 1 2 3
- Does it have adequate safety features in case of emergency? 1 2 3
- Does it let you stay within your budget? 1 2 3

After assessing the site according to these criteria, ask yourself whether anything about the site would cause you to reject it out of hand. If the answer is "Yes," look for another place!

However, if you see that the potential site has no overriding negative feature, add up the scores you wrote on the questionnaire, and divide by 10. How close does this location come to the ideal: i.e., to 1? Can you really tell in the abstract, or do you have to work out a detailed FLOOR PLAN on your Site Selection & Preparation Form? Now ask yourself how the site compares with other locations you've seen. Does it have a greater number of desirable features than any other site? If so, choose it!

Breaking old habits. You might think that the site selection procedure just described doesn't apply to you, because you have to hold your meeting in the same building where you work -- not in some outside locale. All of us tend to think like this because we're creatures of habit. And habit has a way of blinding us to opportunities that exist around us, often in abundance. Therefore, we go on cramming everyone into our office or some other inadequate space that we're accustomed to using. Where have you routinely held your meetings?

What other locations might replace your usual meeting room? Think of on-site locations you might reserve . . . like the Board Room, Viewing Room, or Coffee Lounge.
Now think of some possible off-site locations . . . places like the nearby College that has a splendidly refurbished Meeting Room, with adjoining kitchen facilities, and a President who's been making repeated overtures for closer associations between "Town" and "Gown"; or your spacious new cottage just half an hour away, where you could meet your staff on a Sunday afternoon and, for a change, creatively mix business with pleasure and good fellowship.

Modifying the site. Of course, there are times when you have no choice, and either have to meet in your own office or in a site someone else chooses for you. Even so, plenty of options may be available -- options that can turn the usual humdrum meeting into a lively, productive one.

For example, you don't have to plunk yourself down in a room that others have left in disarray. If you take the trouble to find out who'll be in the room immediately before you and when they're supposed to vacate, you can schedule enough time before the start of your meeting to tidy things up, position the furniture to your liking, and set up your equipment. Thus, you'll be able to hold your meeting in a room which, insofar as possible, has been tailored to your needs.

This rule doesn't apply only to specially designated meeting rooms. If you intend to hold the meeting in your office, for example, what impression will your workplace make on those who enter? And how close will that impression be to the one you'd like to prevail? Will the room be in order? Will the climate be comfortable? Will the lighting be appropriate for the work to be done? Will everyone have enough space? Will they be able to see, hear, and take notes without difficulty? Will the room help put the participants in the right mood?

Seating plans. One of the most important factors in creating the "right mood" is the seating arrangement. Diplomats and socialites are well aware of how important seating is.
They know that there's a seating plan language, and they use that language expertly. Where they put people tells a lot about what they think of those people and what they want from them.

Let's examine a specific incident that occurred in the electronics company we discussed in Chapter II -- the company in which we said you're employed as Head of Sales. As you talk to people in the firm, you learn that two weeks ago your colleague in R & D held a small, but tension-filled Committee meeting in his office. It began at 3:00 o'clock on Friday afternoon. From comments made by various individuals, you discover the following. As shown in Diagram A (p. 32), the office was arranged with the Department Head's desk at the upper left, a long table with four straightbacked chairs below it, and two stiff old arm-chairs parallel with the table on the righthand side of the room. No plans had been made to serve refreshments and no agenda had been prepared to help guide the discussion.

The first person to enter was the Deputy Head of Department. Finding his superior working at his desk -- Position #1 -- and being given no indication of a seating plan, the Deputy placed himself in Position #2, from which he'd be able to see the Department Head no matter where anyone else sat.

The second person to enter was a staff member who'd been put down by the Head of Department several times in the last few months and who, by now, was discouraged and uncooperative. Recalling that the Head always stayed at his desk during Committee meetings, and seeing no sign to the contrary on this occasion, the disaffected member sat in Position #3. From here, he thought, he'd be able to see both the Head and Deputy Head quite easily, and still maintain a comfortable distance.

The last person to enter was a staff member who had to travel a long way to attend the meeting. Embarrassed at arriving several minutes late, he dropped into the first available seat: Position #4. The Head of Department commented
that he looked very "summery." By contrast, the colleague beside him looked quite "wintry," the Head remarked.

As is evident from this description, the Department Head did nothing to prepare his office for the meeting. By remaining at his desk, he effectively reminded everyone that he was Número Uno. By not providing a seating plan, he intimated he didn't care where the participants sat . . . just as long as they didn't sit close to him. By making his "summery-wintry" comments, he let everyone know what kind of an atmosphere existed between him and the respective staff members. By not offering refreshments, he made it plain that the amenities weren't of concern to him. By not preparing an agenda, he suggested he hadn't put much thought into the business the Committee was about to discuss. And by calling the meeting for 3:00 o'clock on Friday, he gave a tacit explanation of why he hadn't thought much about it: it simply wasn't important to him.

What we see here is that words are not the only vehicles of communication. What is done -- and what is not done -- says a great deal. Timing carries messages, too. And seating can also speak quite eloquently. So before you hold your meeting, examine the Sample Seating Arrangements shown on p. 33 and decide what you want your seating plan to say. Among the principles you might keep in mind are:

- The degree of formality tends to increase as the Chairman of the meeting approaches the perceived "head" of the room, as he augments his distance from the participants, and as the seating arrangement becomes more "angular."

- Conversely, the degree of informality tends to increase as the Chairman moves away from the "head" of the room, as he approaches the participants, and as the seating arrangement becomes more "rounded."

In view of this and other points we've made so far, we could say that if the Department Head described above had wished to set a completely new tone for his meeting, not
only would he have held it at a more auspicious time, prepared a written agenda, offered the Committee some refreshment, and avoided making hurtful comparisons between staff, but he would have created a seating plan designed to stress his affective proximity to the group and his willingness to interact with it as an intellectual equal committed to solving a problem of importance to all of its members. If he insisted on holding the meeting in his office, that seating plan might have looked like Diagram B (p. 32). If he had wanted to be even less formal, however, he might have chosen another room in the building -- a room far from his official seat of power and, if possible, associated by the staff with a spirit of commonality and collegiality in pursuit of Company goals.

If you want to stress equality and collegiality when holding your meeting -- the one at which you'll discuss how to launch your Company's new product -- you'll search for a room with a round or oval table like the ones shown in the lower left quadrant of the Sample Seating Arrangements. If you wish to add a note of informality, as well, you won't sit at the "head" of the room, but will place yourself at some distance from it. Moves like these might help make the participants more comfortable -- which, of course, will be to your credit.

You could score yet another point through seating: you could assign the perceived seat of power to your special guest, the Vice President of Finance. By placing him at the "head" of the room, you'd show your respect for his rank and the power associated with it -- which is bound to please him. In the meeting proper, however, the real power would belong not to him, but to you, the Chairman.

Notice of meeting. Once you've selected the right day, hour, and location for your meeting, you must inform your participants of these details. The best thing to do is draft a memorandum in the "Notice of meeting" space on your Meeting Planner. This notice should indicate from whom
it originates, to whom it is going, when the meeting will take place, where it will be held, what public objectives you have, what subjects you'll deal with, and what other people will be in attendance. By including all of this information, you'll be giving everyone a chance to plan their "participation strategy" well in advance of the meeting.

After drafting the "Notice of meeting," let it sit for a day or so before you send it. You might think of some editorial changes that could improve it, some item that could be added, or some information which might properly be excluded. As you know, it's not wise to send out written communications in haste.

One of the things you'll want to pay special attention to is the question of which documents should accompany the notice, for to a great extent, the success of the meeting will depend on how well informed your people will be when they get there. To assist you in this regard, the Meeting Planner provides space for you to list the documents you wish the participants to receive.

When you complete the list, tally the number of pages in these documents and multiply by the number of copies you'll need. This will help you plan your budget for the meeting. If you discover that printing or duplicating all this material will be too expensive, you'll have to look for less costly ways to disseminate the information. For example, if there's enough time before the meeting, you might circulate one copy to everyone through intra-office mail. Or, if time is scarce, you might find ways to make the material more succinct -- which would be especially pleasing to the recipients.

After deciding this question, write the "Distribution date" on the notice. This will not only help your secretary plan her time efficiently, but will guarantee that the notice and documents will reach everyone when they should.

Finally, make certain that a copy of the agenda goes out with every notice! This will give the participants important direction in preparing themselves for the meeting.
Room readiness. With all this spadework, you can be sure everyone will be ready for the meeting. But how about the room? This is something you'll have to take care of, also.

First of all, see that the temperature is right. About 68-72 degrees is the optimum level. If it's hot, people get drowsy. If it's cold, they tend to get jumpy. Either situation will adversely affect their efficiency. So check the thermostat in advance of the meeting and make the required corrections. Of course, sometimes there is no thermostat. In this case, adjust the radiators, open or close some windows: do whatever you can to create a comfortable climate in your room. As an added safeguard, find out whether blinds must be drawn at the time of your meeting to prevent sunlight from inconveniencing the participants.

Next, check the lighting and electrical systems. Find out where the switches are; which switch controls which light, wall socket, microphone, and loudspeaker; and which lights need attention from the maintenance staff. In this way, you'll protect your meeting from flickering fluorescents and other electrical problems that could undermine its workings.

Once these matters have been attended to, check the acoustics. Sound often filters in from outside, and this can be an obstacle to your success. So do whatever is necessary to prevent external noise from intruding. In addition, see to it that no inside noise will diminish audibility. To guarantee that everyone is heard, you may have to use an in-house or portable sound system. In the event these are unavailable or impractical, use your seating plan to bring people as close together as possible. If your meeting is held theater-style in a large room, put printed material as close to the front as you can. This will discourage people from sitting at the back of the room or way off at the side.

Then examine the room for tidiness and cleanliness. Move unnecessary equipment out of the room or into some unobtrusive corner, arrange the furniture neatly, and remove
any trash that previous occupants may have left behind. "Trash" includes not only things like their coffee cups and cigarette butts, but also what they may have failed to erase from the blackboard.

After this, make sure that all the equipment you itemized on the *Site Selection & Preparation* Form is exactly where you want it to be. And see that it's in perfect working order. Don't take anything for granted where electrical and mechanical gadgets are concerned: test them in advance; have spare bulbs, batteries, and similar parts ready at hand; and if the success of your meeting rests very heavily on the workings of a single machine, bring a backup device just in case something goes wrong with the primary one.

Finally, go over the printed material that must be distributed at the meeting. Is it all there? Is it in the proper sequence? Are all the copies perfect?

By doing these things, you'll create an image of order. This is important to success. Order makes people feel secure. When they see order, they feel they're in capable hands -- your hands: the hands that now open the doors and invite the people in.
MEETING SKILLS

The effective chairman. To preside over a meeting doesn't mean to be a dictator, but to be a politician. A dictator is someone who rules by himself. A politician, on the other hand, does not govern alone. He must artfully guide, persuade, reconcile, and reward. That is, he must work adroitly with other people -- people who give him support because they see that, in the long run, it's in their best interest and that of the majority to do so.

In this society, we don't like dictators. Nevertheless, there's a bit of the dictator in us all. And at a meeting, he's just itching to show his stuff. When acting as chairman, he makes himself known in a number of ways. For example:
- He talks a lot. Although specialists in business management recommend that a meeting chairman should speak no more than 25% of the time, the average chairman in North America speaks twice or three times that much. How close to the mark do you come when you preside over a meeting?
- He demonstrates a lack of respect for the interests, ideas, and sensibilities of others. He says things like "Don't be ridiculous"; he rolls his eyes, holds his head in disbelief, winces, and grimaces when people make statements he doesn't like. Have you ever said or done things like this while chairing a meeting?
- He takes credit for the achievements of others. This is one of the most reprehensible acts that can be
committed in the world of work. Are you guilty of this offense, or do you always give credit where credit is due?

- He blames others for his own mistakes and shortcomings. What he doesn't seem to realize is that sooner or later, people will stop believing that the scapegoats he supplies are responsible for his errors. Their disbelief will lead first to disaffection and then to insurgency. One way or another, in the end he'll be ousted. How many scapegoats do you cite when explaining why things have been going badly in your domain?

- He insists on having his way, even though the evidence or the will of the majority are against him. How hard do you dig in your heels when the opposition speaks?

At a meeting, you don't want to get your authority from the power that rank alone confers. Rather, you want it to be given to you voluntarily by the participants, as a result of the qualities you exhibit. You want your authority to derive from the excellence of your preparation. First-class preparation simplifies life for others. And this leads to cooperation on their part in the future.

You want your authority to come from a recognition by others that you have a deep concern for the issues and a sincere respect for everyone's opinion. You want your authority to stem from each person's faith in your objectivity and impartiality. You want your authority to be rooted in a belief that you're not inflexible or intransigent, but are willing to modify or even reverse your position if the evidence warrants.

You want your authority to flow from an appreciation of the dynamic way you speak and the conviction you display that the work of each person has value.

You want your authority to come from the fact that you have the air of a leader about you. You sit up straight, dress smartly, and groom yourself with taste. You're not long-
winded or grandiloquent, but speak crisply and to the point. You avoid annoying mannerisms like tinkling and tapping, drumming, clicking and rapping throughout the the course of the meeting.

You want your authority to derive from the way you follow the agenda, keep to your schedule, give direction when needed, let everyone be heard, and deal diplomatically yet firmly with latecomers, nitpickers, gabbers, and those who are chronically bored. There’s no place in your meeting for anything or anyone but the best.

The effective participant. As we’ve seen, good leadership requires a lot of talent, awareness, sensitivity, and preparation. But it also needs good participation from those attending the meeting.

All too often, people shirk their responsibility and let the leader do it all. In a democracy, good leaders abhor this kind of situation. They don’t want to govern alone, for they know that no one person has a monopoly on talent, sensitivity, or wisdom. Recognizing how much their success depends on the creative involvement of others, they do their utmost to keep their people informed on the issues and constructively active in the decision-making process.

People who have leaders like this soon learn the advantages of cooperation. They’re willing to give a lot to the meeting, because they know they can get a lot from the meeting: a chance to learn, a chance to meet people, and a chance to display their knowledge and special aptitudes.

When preparing for a meeting, the good participant acquires a great deal of information about the organization he works for. In the course of time, he gets to know its policies, its workings, its problems, and its prospects for the future. From this, he can formulate a more definite picture of the prospects of his own career.

The good participant sees superiors, colleagues, and subordinates acting in a variety of situations. He comes to know their strong points and weak points; their goals,
values, and quirks. He discovers who'll help and who'll hinder his professional progress. He gets opportunities to form networks and alliances with those who'll promote his interests because of what or whom they know. And, if he has a mind to, he can get a lot of information about himself: his values and expectations, his virtues and vices, his level of career satisfaction, his standing in the eyes of others.

The good participant also gets a chance to demonstrate his special competencies before people on different levels of the organization. He can show others why he's a valuable member of the group -- one who should be kept on the team and be appropriately rewarded for his contributions to its success.

Like the good chairman, the good participant never treats a meeting as something routine. In his eyes, the only thing that's "routine" about a meeting is the excellence of the work he's disposed to put into it. He's willing to give his time, thought, energy, and good will to the meeting. He's willing to give the meeting his unique sensitivity, his information, and his expertise. He's willing to set an example for others to follow.

Before the meeting, the exemplary participant prepares thoroughly on the issues. During the meeting, he presents a positive image, stays tuned in, keeps an open mind, speaks briefly, and sticks to the point. After the meeting, he does a careful assessment of what transpired, evaluates the participants and himself, and provides the chairman with useful feedback.

Some pointers on communication. To a great extent, the success of a meeting rests on how effectively everyone communicates. Communication is the process by which people transmit information to each other. Communication is effective if, at the end of the process, the receiver of the information understands and appreciates the message in essentially the same way as the person who sent it.

Information may be transmitted by signs (the red
octagon that tells the motorist to STOP), by **symbols** (the colored banner that calls to mind that complex thing called COUNTRY), and by **words**: written words and spoken words.

Spoken words tend to be much more informative than written words, for when we speak, we use more than the words themselves to convey our message. We use tone of voice and body language, also. Tone of voice -- comprised of such things as pitch, volume, and emphasis -- allows us to **color** as well as **shape** the message. And body language -- consisting of facial expression, gestures, and posture -- enables us to make the message still more precise.

What does this "message" consist of? In part, **ideas**. In part, the **implications** and the **value** of those ideas. What changes their implications and value is the complex of experiences that each of us has had during our lifetime. Consequently, although the same message is transmitted to all of us, each person will perceive and appreciate it differently. Let's take an example.

If, in a lecture last Tuesday, a professor of astronomy had said "The Earth revolves around the Sun," his message probably wouldn't have triggered any intellectual surprise or strong emotional response in his audience. Yet in 1633, when Galileo conveyed the same message to the members of the Inquisition at his trial for heresy, there was outrage. Perhaps the **idea** was the same in both instances. Perhaps even the **words** were the same. But the **message** was not. The message became different for each group because their respective life experiences caused them to perceive it in a special way . . . a vastly different way.

When **you** speak, you'll want to avoid such disparity. You'll want your listeners to have a common understanding and appreciation of what you say. And you'll want it to match your own. In order to achieve this objective, you'll have to do the following.

First, you'll have to be **receiver-oriented**. To this end, you'll carefully research your audience to discover what
frames of reference you share with them. By knowing this, you'll be able to move intellectually and emotionally closer to them. You'll even use their language -- including some of the technical expressions and buzz words that are fashionable among them -- but without complexity. Complexity makes people tune out; simplicity keeps them with you. And insofar as possible, you'll avoid subjects that make them uncomfortable, for you don't want them to improve their comfort level by screening out your message.

Second, you'll have to approach your audience when they're in best condition to receive your message. That is, in their prime time: the time they'll be most receptive to what you want to say. If the right moment has passed, or has not yet come, it's probable that your message will fall on deaf ears. This is a trap you'll want to avoid.

You'll have to watch your timing in another sense, as well. When you speak, you'll be brief and to the point. Nowadays, everyone suffers from information overload. Their attention span is short. So you'll learn the lesson of the TV ad men: "Coke is it!" And if you're asked to elucidate or make a special presentation, you'll find out how much time will be at your disposal -- and you won't exceed that limit.

You'll have to make your message credible, too. Credibility comes from presenting relevant data, in judicious amounts, clearly focused, logically sequenced, appropriately illustrated, and discreetly timed. The only way you can accomplish this is through intensive preparation: when you collect the information, when you analyze it, when you organize it, and when you rehearse its presentation.

And finally, to insure that everyone understands your message properly, you'll encourage feedback ... within the time available to you. If you do all this, you'll be an effective communicator -- a person highly prized in any meeting.

Preparing a report. One of the most important contribu -
tions a person can make to a meeting is to submit a first-class report. Whether yours is a written submission or an oral presentation, you'll use the same guidelines in preparing it.

First, find out what general subject you're supposed to address and what specific facet of that subject you must explore. Having the subject clearly in focus from the beginning will save you time and energy during the preparatory phase, and will spare you embarrassment when you present the results of your work to the group.

Once you know, in the most specific terms possible, what subject you're to deal with, you may begin your research. "Well-researched" is one of the greatest compliments that can be given to a submission. If you want your report to deserve that distinction, you'll have to be very thorough in gathering data: facts, figures, and other people's opinions.

After you locate these things, however, you'll have to impose some serious restrictions on yourself. You won't take notes on everything you find, but only on material that's relevant to the carefully-defined subject you're focusing on. And of this, you'll want only the essence, not long verbatim extracts or rambling contextual data. You'll paraphrase more often than quote, synthesize rather than reproduce every word, every figure. You know that figures alone are boring and contain little inherent meaning. Figures become important when they clarify something or help someone decide on a course of action. To do this, they have to be associated with an idea. Statistics may help you formulate that idea or help you support it; but remember: it's the idea you want your audience to take away from the meeting, not the statistics.

That idea will be understood best if it's logically developed. Despite the computer revolution, people tend to shy away from random access searching. They're still programmed to comprehend things in a linear way. So be sure to make your presentation "by the numbers": 1-2-3. One concept at a time. Each clear, each in its logical place,
each carefully chosen to develop the main idea. And every so often, a dynamic illustration -- one that's short, easy to understand, and relevant to the message you're trying to convey.

Brevity is a virtue, both in the exposition and the illustration of your main idea. You'd be surprised at how much can be cut out of a draft without losing real substance. In fact, your report will probably have much greater impact if it's short. Do you remember? "Coke is it!"

Well, maybe that's a little too short. You need a good introduction and a good conclusion to enhance your report. Something to attract audience attention at the beginning, and something to emphasize the truth of your assertions at the end. Something like:

"Hey! . . .
Coke is it! . . .
Yeah!"

Some people find it difficult to organize their ideas after they do their research. If you have this problem, you'd probably benefit from using the Report Design Form shown in the Appendix. For openers, the Form asks you to define your subject in the most specific terms possible. It then gives you space to list whatever ideas come to mind in non-prioritized order. These items, together with relevant illustrations, references, and supporting material, are the point of departure for your report. By checking the appropriate column to the left of each entry, you'll be able to distinguish the Major ideas (M) from the Subordinate ones (S).

Once you've made this distinction, you can begin structuring your report. This is done by putting the Major ideas in priority order in the section marked DRAFT OUTLINE. Which Major idea should logically come first? Which should come second? Which should come third?

When you've done this, return to the points you desig-
nated as Subordinate. As you examine them, determine their relationship to the Major ideas. Does logic tell you to associate a particular S with M1, M2, or M3? Place it in the Subordinate points box which corresponds to that M category on the DRAFT OUTLINE. Continue the process until you've placed every S beside the Major idea it's related to.

The next step is to put all the S points associated with a given M category into logical order -- an order than allows for a smooth development of the Major idea. As you get a feel for this, put a sequence number beside each S point in the category. In category M1, which point should be designated S1; which, S2; which, S3? When you finish logically arranging the Subordinate points in category M1, go on to M2 and do the same thing. Continue the process until you've completed all of the categories.

Look over your DRAFT OUTLINE carefully. Have you omitted any Major ideas or Subordinate points? If you have, insert them in the proper place and adjust the outline accordingly. If you find that an item is not germane to the topic or really essential to its development, strike it out and revise the outline. If you notice that a point is out of order, move it to its logical position in the outline.

When you're satisfied you've included everything that's truly essential, and when you're convinced that everything is in proper sequence, use the space provided at the bottom of the Form to write out a brief SUMMARY of your report. What are you actually saying in it? Is this what you wanted to say? If not, you'd better go back to the drawing board and make the necessary substantive or organizational corrections.

If you are satisfied that the report is an accurate reflection of your thinking and will be easy for others to understand, you can move to the next step in Report Design. That is, you can prepare your FINAL OUTLINE. It's here that you'll indicate in the most specific terms possible what the title of your report is to be, how your report will be
introduced, how it will be developed and illustrated, and how it will be concluded.

Please pay special attention to your title. The title will not necessarily be the same as the subject you were assigned to discuss. Indeed, most of the time, it shouldn't be the same. As was stated earlier, your subject is usually a specific facet of some more general topic. If the general topic is "Launching our new product," your specific theme might be "How to approach the resistant consumer." That's pretty well-defined . . . but it doesn't have flair. And without flair, it won't make your audience sit up and take notice.

Since you know you'll be handicapped if you have anything less than full attention, you decide to look for a title that's informative and appropriate, but that has a little more pizzazz. Keeping your particular group in mind, as well as the expected tone of the meeting, you finally hit on:

Every Eskimo Needs a Fridge!
How to Approach the Resistant Consumer

With a title like this, you should get the attention you want from your audience.

Now that the title is taken care of, you can consider the possibility that there might be questions from the audience after you finish your presentation. In preparation for this eventuality, it would be wise to fill out the bottom portion of the FINAL OUTLINE. It's here that you'll list a few difficult questions that might be asked from the floor: the questions and the kind of response you'd give, should the need arise; for as an exemplary participant, you know there's no substitute for thorough preparation every step of the way.

Don't try to take shortcuts where the FINAL OUTLINE is concerned. The FINAL OUTLINE is important for several reasons. First, it helps you. You know how easy it is to go off track when you're writing. Well, the FINAL OUTLINE keeps you focused on topic as you put your ideas into words. It helps guide you through the forest, one might
Later, the FINAL OUTLINE will help keep your audience properly oriented, as well. If your report is written, the FINAL OUTLINE will become its "Table of Contents." If the report is oral, it will become the "Program Handout" that you'll distribute to everyone in advance of your presentation. **Before** your talk, this Program Handout will tell the audience what subjects you'll cover. **During** your talk, it will keep the audience with you as you develop your ideas. And **after** your talk, it will remind them of what you said. As you can see, the Program Handout for an oral presentation functions in exactly the same way as the program an audience receives at a concert or a play. A sample Program Handout is shown on page 45. Please look at it before you go on.

**The image of excellence.** Both you and your handouts must present an image of excellence. Much as you'd like to think that it's only the intellectual content that counts, people will pretty well judge the worth of your talk long before they hear the whole of your message. That's because almost all of us make our judgments in the following sequence: first through our eyes, then through our ears, next through our spiritual antennae which pick up the vibes that others send out, and finally through our mind. This is why, in the Evaluation Criteria list on page 46, PRESENTATION comes before CONTENT, and why the visual and acoustical images precede the spiritual and intellectual ones within those categories. The gist of this message, then, is that when it comes to oral presentation, everything is "content." You make an impression not only by what you say, but by how you look and sound when you say it, and by how professionally you illustrate your message. We live in a high tech age. Our audience expects quality presentations everywhere: on radio, on TV . . . even in the meeting room.
We must satisfy and surpass those expectations if we want to reach the pinnacle of success.

SO YA WANNA TALK IN PUBLIC

Five Tips for Effective Speaking

Introduction

Some facts about oral communication

A process for transmitting information

Key ingredient: a common language of transmission

Desired result: common understanding of the message

How to communicate effectively

Be receiver-oriented

Approach your listener in "prime time"

Be brief and to the point

Be credible

Encourage feedback

Conclusion
EVALUATION CRITERIA

PRESENTATION

Visual image
- Bearing
- Clothing
- Grooming

Acoustical image
- Audibility
- Pronunciation / intonation
- Pacing

Spiritual image
- Animation
- Contact with audience
- Confidence

CONTENT

Illustrative materials
- Visual / auditory quality
- Relevance
- Effectiveness of use

Expression
- Correctness
- Precision
- Elegance

Information
- Relevance
- Quality
- Organization
- Quantity

Length
- Time allotted _____ mins.
- Time used _____ mins.
- ± _____ mins.

Response to questions
Keeping records. "Much said, little remembered" is a comment that could be made about most of the meetings we attend. In part, this is because of the quality of what is said. In part, it's because of our failure to institute a first-class record-keeping system.

In addition to the preparatory materials which the chairman and the participants put together in advance of the meeting and store in their files for future reference, a meeting should generate four types of records: an attendance list, a set of minutes, an assessment of each person's contributions, and an evaluation of the interactive process that took place among the participants.

Attendance. Who attends, when they arrive, when they leave -- and possibly why -- are details every chairman should document. If, as we saw, your files show that the Vice President of Finance habitually arrives 15 minutes late, you'll be able to plan your agenda strategy more realistically.

When you hold your meeting, you can take attendance in a private or a public way. You can either have your meeting secretary use the Attendance Form shown in the Appendix to keep a discreet record of attendance, or you can have each participant sign the Form personally when he enters. The latter option is a particularly effective deterrent to lateness within a department, for employees are reluctant to give their boss repeated evidence of tardiness. But even if
punctuality poses no problem, the attendance records of subordinates, colleagues, and superiors will prove their utility. They'll help you get to know your people better -- and to act accordingly.

Whether you use the Attendance Form to record when people arrive (Ar) and leave (Lv) or whether you don't, you will use it to show who comes to the meeting. The Form has 40 numbered name slots for this purpose. The numbering system is such that if the meeting has over 40 participants, you can duplicate the Form and insert the appropriate tens digit in front of each of the zeros until you have enough numbered name slots for everyone. After insertion of the tens digits, page one would contain the groupings 1-40, page two would have 41-80, and so on until your requirements are met.

Minutes. The minutes are the official record of a meeting. In their final form, they represent an agreement between the chairman and the participants concerning what was said and done at the meeting. The raw material for this historical account should be recorded on the Minutes Form that's shown in the Appendix.

As you can see, the Minutes Form has space for the name of the committee that's holding the meeting, the date, the nature of the business being transacted (business arising from a previous meeting, or new business), the topic being discussed, a step-by-step account of what was said about that topic, a note showing when the discussion started and when it ended, and a comparison between the estimated time for discussion and the real time it took to dispatch the topic.

Often, the proceedings of an entire meeting can be documented on a single Form. However, when the agenda consists of several important topics, it's advisable to assign a separate page to each one. In this way, your files will become extremely flexible: they'll allow you to examine the overall workings of a particular committee, or to focus on how that committee dealt with a given topic over time. If the
latter is your objective, you'd select from your Minutes file all of the Forms that pertain to the topic, duplicate those Forms, and store them in a looseleaf binder until you're ready to start your analysis.

In order to keep reliable records, it's necessary to have an extremely competent secretary -- someone who's skilled at eliminating the verbiage and capturing the essence of what was said; someone who believes in giving credit where credit is due; and someone who's inclined to ask for and incorporate essential clarifications, so that everyone who ultimately reads the minutes will understand the proceedings in the same way. In addition to having these qualifications, the secretary should be a person who isn't crucial to the progress of the meeting, for it's almost impossible to be an objective observer and an active participant at one and the same time.

It should be emphasized that no matter how good the secretary is, the raw minutes must be scrupulously edited. The final version should contain the essence of everything that transpired at the meeting. It should be brief. And it should be accurate. Since accuracy is so crucial, it's wise to circulate the final version of the minutes among participants as soon after the meeting as possible. That way, everyone will be able to make emendations while the meeting is still fresh in their mind.

If the committee is to convene again, all suggested emendations will be discussed at the next meeting. At that time, any motions for changes in the minutes will be recorded on the Motions Form shown in the Appendix. It's on this Form that a record of all voting will be kept. The Motions Form will indicate what was moved, who the mover and seconder were, and how the voting went: if the vote was unanimous (U), or if not, how many voted in favor (√), how many voted against (X), and how many abstained (Ab).

If the committee doesn't plan to convene again, the minutes should be circulated to everyone who attended the
meeting. If any suggestions for increasing the accuracy of the minutes are made and if the chairman agrees, those suggestions should be incorporated into the minutes, and a corrected version -- clearly designated as such -- should be distributed to all concerned.

**Participant input survey.** The minutes are an objective record of what took place at the meeting. They're the official history of the event. And they have a fundamental place in the workings of the organization. However, every conscientious, upward-aiming member of the organization -- and meeting chairmen, in particular -- should want to keep a subjective record of the event, as well. This is so because future progress depends on an accurate understanding of the past: an understanding of what happened, where it happened, when it happened, why, how, and due to whose intervention.

As a first step in comprehending the past, you must survey the contributions of all participants in the meeting, including yourself. This is done by completing the **Participant Input Survey** shown in the Appendix. Put the names of everyone who attended the meeting into alphabetical order, and insert each name in the space at the top left corner of each box. Be sure to include your own name. Then reflect on what each person contributed to the meeting. You may do this in any sequence you like. You don't have to follow alphabetical order when doing your survey. Alphabetization is recommended only because it will give you a chance to find information rapidly if you have to consult the Form in the future.

Put down anything that comes to mind -- anything that might enable you to refine the judgments you made when you filled out the **Participant Review** Form in advance of the meeting. That is, data concerning each person's strengths and weaknesses, preparation, position on issues, power base, goals and tactics, personality traits, and effect on the meeting. And remember: at times, **not** doing something is
equivalent to doing something. For instance, if an individual has consistently opposed the majority on a given issue, but chooses to remain silent on this particular occasion, his silence should be treated as an "act."

**Meeting evaluation.** The next step in trying to understand the past as a preparation for the future consists of assessing the positive and negative features of the meeting as a whole. To this end, you may use the *Meeting Evaluation* Form shown in the Appendix. As you can see, the Form consists of two parts: PERSONAL FEEDBACK and FEEDBACK FROM OTHERS. Start with your own impressions of what was achieved, what was not achieved, and why these results came about. Try to determine what problems arose in the meeting or as a result of the meeting, and do your best to figure out why. Specify what can be done to correct or avoid those problems in the future. And conclude by putting down any other observations you think might prove helpful at a later date.

You're not the only one whose impressions are important, however. You also want to know what other people think and how they feel. Maybe their feedback won't be as candid as your own, but if you know how to ask, you can get a lot of information from others -- even highly sensitive information. As you elicit this information, summarize it in the section marked FEEDBACK FROM OTHERS, and be sure to indicate what action you intend to take as a result of having this knowledge. Knowledge for its own sake is not what you need. You require knowledge that leads to action -- more judicious action than you'd have taken if not so informed.

**Conclusion.** A lot more can be said about meetings, no doubt. It's the author's hope, however, that the ideas presented here will not only help sharpen your sensitivity to the importance of meetings, but will also help you increase your appreciation of their complexity and make you actively
aware of the potential they have for personal and communal gain. He hopes you'll implement some of his suggestions and try using the Forms he has designed. And if you've got some ideas that might help improve this brief book, he'll most cordially welcome your input. Until then,

*have a successful meeting!*
APPENDIX
## OBJECTIVES

### ALTERNATIVES TO A MEETING

**Written communications**
- Memo
- Letter
- Report
- Newsletter
- Questionnaire
- Other

**Oral communications**
- Phone call
- Face-to-face
- Other

**Direct action**
Other

## POSTPONE THE MEETING

- Insufficient substance
- Insufficient prep time
- Key figure(s) absent
- Discord anticipated
- Inconvenient day / hour
- Other

## CALL THE MEETING

**Date**

**Hours**

**Place**

## NOTICE OF MEETING

**DISTRIBUTION**

Send notice to:

**DOCUMENTS**

Include the following documents:

Distribution date

No. of copies

Total no. of pages
## AGENDA ORGANIZER

[M = Mandatory, O = Optional, Comp = Complexity (high, med., low), ET = Estimated Time (in minutes)]

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<th>M</th>
<th>O</th>
<th>Comp</th>
<th>ET</th>
<th>Final Agenda Sequence</th>
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<th>Prep.</th>
<th>Position on Issues</th>
<th>Power Base</th>
<th>Goals &amp; Tactics</th>
<th>Personality Traits</th>
<th>Effect on the Meeting</th>
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</table>
SITE SELECTION & PREPARATION

Your requirements. The first step in planning is to determine what your own requirements are. Choosing the best site for your purposes comes next. After selecting the site, where possible, show the location of each item on the FLOORPLAN (next page).

1. Chairs
   - No. __ Type __________________ Arrangement __________________
   - No. __ Type __________________ Arrangement __________________

2. Tables
   - No. __ Type __________________ Location __________________
   - No. __ Type __________________ Location __________________

3. Lectern: No. __ Type __________________ Location __________________
   - No. __ Type __________________ Location __________________

4. Blackboard
   - __ Fixed __________________ Location __________________
   - __ Portable __________________ Location __________________

5. Chalk: Color(s)_____________________ Eraser

6. Flip chart: Type __________________ Marker color(s) __________________

7. Audiovisual equipment
   a. Type __________________ Location __________________
   b. Type __________________ Location __________________
   c. Type __________________ Location __________________
   d. Type __________________ Location __________________
   e. Type __________________ Location __________________

8. Extension cord
   - No. __ Type __________________ Location __________________
   - No. __ Type __________________ Location __________________

9. Posters
   - No. __ Type __________________ Location __________________

10. Handouts
    - No. __ Type __________________ When? ________ To whom? ________
    - No. __ Type __________________ When? ________ To whom? ________
    - No. __ Type __________________ When? ________ To whom? ________

11. Other.

12.

13.

14.

15.

16. Refreshments: Time(s) __________ Location(s) __________
    - Type __________________ Number ________ Cost ________ Special Instructions __________
      a. Soft drinks ____________________
      b. Tea __________________________
      c. Lemon ________________________
      d. Coffee ________________________
         - Reg. ______________________
         - Decaf. _____________________
      e. Sugar/sweetener __________________
      f. Milk/cream ____________________
      g. Ice __________________________
      h. Glasses _______________________
      i. Cups _________________________
      j. Water pitcher(s) _____________
      k. Plates _______________________
      l. Cutlery/stirrers _______________
      m. Napkins _____________________
      n. Ashtrays _____________________
      o. Other _______________________

---

58
**SITE SELECTION & PREPARATION (cont.)**

**Characteristics of the meeting room.** The numbers to the left of each item are a continuation of those on the preceding page. Wherever possible, use them to show the location of each item on the FLOORPLAN.

<table>
<thead>
<tr>
<th>17. Door</th>
<th>18. Window</th>
<th>19. Electrical outlet</th>
<th>20. Lighting controls</th>
<th>21. Audiovisual controls</th>
<th>22. Temp. controls _Heat _Air cond.</th>
<th>31. Storage</th>
<th>32. Dressing room ([L\ x \ W\ x \ H])</th>
<th>33. Cloak room _Attended</th>
<th>34. Coat rack _Attended</th>
<th>35. Stage ([W\ x \ D\ x \ H])</th>
</tr>
</thead>
<tbody>
<tr>
<td>37. Lights _Full lighting board _Spot</td>
<td>_Incandescent _Track</td>
<td>_Fluorescent _Natural</td>
<td>_Indirect</td>
<td>38. Impediment to visibility or audibility</td>
<td>39. Possible hazard</td>
<td>40. Food &amp; Beverage</td>
<td>License required _F _B</td>
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**FLOORPLAN**

Size of room \([L\ x \ W\ x \ H]\) Type of floor

![Floorplan](image)

Total estimated cost:__________________

59
REPORT DESIGN

SUBJECT:

<table>
<thead>
<tr>
<th>IDEAS listed in non-prioritized order (M = Major idea, S = Subordinate point)</th>
<th>ILLUSTRATIONS AND REFERENCES</th>
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<td>M</td>
<td>S</td>
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**DRAFT OUTLINE**

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**SUMMARY:**
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62
COMMITTEE

MINUTES

___ Business arising from minutes
___ New business

TOPIC

Date

From ___ To ___
ET ___ Real time ___
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<tr>
<th>MOTION</th>
<th>Mover</th>
<th>Seconder</th>
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**PARTICIPANT INPUT** (Participants -- including Chairman -- in alphabetical order)

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MEETING EVALUATION

What was achieved?

What was **NOT** achieved?

What problems arose in the meeting or as a result of it?

What can be done to correct or avoid these problems in the future?

You can provide your personal feedback for each of the above questions.

**PERSONAL FEEDBACK**

<table>
<thead>
<tr>
<th>What was achieved?</th>
<th>Why?</th>
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<th>What was NOT achieved?</th>
<th>Why?</th>
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<tr>
<th>What problems arose in the meeting or as a result of it?</th>
<th>Why?</th>
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<th>What can be done to correct or avoid these problems in the future?</th>
<th>Other observations:</th>
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FEEDBACK FROM OTHERS

<table>
<thead>
<tr>
<th>Name</th>
<th>Date</th>
<th>Summary</th>
<th>Action to be taken</th>
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The Book

This book presents essential strategies for maximizing the success of business meetings, both from the point of view of the organizer and the participant. It will be of value on all levels of government, as well as in commerce and industry, the social services, education, and the professions.

*Successful Business Meetings* has an easy-flowing style and is filled with practical information which many readers will be able to apply on a daily basis.

Of special value are the 13 FULL-PAGE FORMS which are found in the Appendix. When photocopied and enlarged to 8 1/2" x 11", these will help both the meeting organizer and the meeting participant to plan, shape, and assess their contributions in a logical, meaningful way.

A small investment that will bring great profit!

The Author

Robert Jay Glickman has a Ph.D. from UCLA, an M.A. from Brown University, and a B.A. (summa cum laude) from the City University of New York. He has taught at the University of California and at Harvard University, and since 1963, has been a Professor at the University of Toronto.

Dr. Glickman has been a consultant on subjects ranging from small business advertising to bank credits for importers of heavy industrial machinery. He has extensive experience as a meeting planner and convention organizer, and has conducted seminars on such business-oriented topics as Time Management, Effective Oral Presentation, Career Development, and Career Satisfaction for local, provincial, and national organizations in a variety of fields.

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