



MEET ME IN THE BOARDROOM

An etiquette brief on meetings and presentations
by Civility Experts Worldwide

Introduction

According to the National Statistics Council, 37% of employee time is spent in meetings. Considering what this time translates to in terms of dollars per hour, one had better hope that those meetings are productive. Unfortunately, research indicates that 50% of this time is wasted. (Robert B. Nelson and Peter Economy, *Better Business Meetings* (Burr Ridge, IL: Irwin Inc, 1995). This results in a tremendous cost to the bottom line. For many organizations meetings have become a habit; scheduling them, wasting time with them, attendees becoming frustrated with them, and so on. More and more employers expect that employees (and management in particular) are able to communicate effectively using several or all of the current modes available. This includes telephone, email, conferencing, and face-to-face. Because many of us have been hiding behind our computers for so long, our communication skills; including our ability to listen, to ask intelligent questions, to engage listeners, to pay attention for more than two minutes, and to take sincere interest in someone other than ourselves, is limited. These days time is a valuable commodity and any effort, technique, or strategy that saves time saves money. Planning and facilitating effective meetings is one of those time-saving strategies.

For an expanded lesson plan including activities and answer keys, please visit the shopping cart at www.etiquettetrainingtoolkits.com

Meetings and Presentations (Excerpt)

1. Do you sometimes feel that meetings are a waste of time?
2. Do you ever find your mind wandering or have been caught dozing off in a meeting?
3. Have you ever left a meeting more confused about an issue than when they went into the meeting?
4. And, have you ever been completely appalled by the behaviour of some people at meetings?

The truth is, most often only 1 in 3 meetings should really be scheduled in the first place. And, the purpose of most meetings can usually be addressed in half the time scheduled for the meeting.

There is a range of meeting types including:

- Face-to-face
- Teleconference
- Video-conference
- Webinar
- One-on-one
- Audio-cassette transfer
- Video-grams
- Lunch
- Board
- Committee
- And so on...

And meetings can be held informally or formally, apply to a broad array of people and under an unlimited number of circumstances, however...there are typically three reasons for scheduling a meeting. Those reasons are:

1. To pass on some information
2. To motivate or build commitment and encourage teamwork
3. To make some decisions

Industry experts at www.meetingsnet.com suggest that more and more initial meetings are being conducted via one or more technological meeting tools, e.g., pod casts, webinars, real-time video conferencing etc. This type of meeting results in what could be described as an “electronic handshake”

Many time management and organizational productivity experts suggest that these days, with the simplicity, availability, and effectiveness of email, that in fact,

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unless the information in question will dramatically impact the meeting attendees in some way, the only reason we really need to host meetings these days is to make decisions.

This is initially alarming to some people, they think, “But, what about my weekly touch base or client-building meetings?” “What about my Annual General Meetings?” “What about the preliminary, let’s introduce ourselves to each other meetings?” Of course there are going to be “information” situations where a meeting is still appropriate, but the bottom line is, even the information covered in those meetings can often be delivered in other more time-effective ways. For example, most information (but of course not information that is sensitive or emotional in content) can be delivered via memo, fax, email, and maybe even telephone.

Most relationship building and/or initial “get to know each other” meetings can be handled by sending bios and/or resumes or visiting each other’s web pages, and then telephoning each other. Then when the time comes to make a decision on some action you are taking together, you can meet face-to-face for that meeting. This save time in transit, avoids delays, and eliminates time-wasters such as social chit-chat when there is business to accomplish.

For practice exercises answer keys and more tips on how to manage meetings please see the expanded version of this Brief- available at www.culturalcompetence.ca (click on the shopping cart)

According to www.meetingtrends.com 10 new trends in business meetings are:

- **After-hoursMeet** – a quickie event near the office from 6-8pm to plan for the week/month ahead
- **PerformanceMeet** – deliberate emphasis on getting the most out of each delegate present by careful advance planning of their intended contribution
- **SpeedMeet** – as much an interview as a get-together, with the focus on senior managers talking one-to-one with each delegate
- **IntegrationMeet** – in the interests of bonding, the bringing together of two offices at a half-way point to ensure synchronised efforts
- **Off-the-shelfMeet** – doesn’t matter where it is, or which brand it is, ‘get me a venue for tomorrow’
- **SmalltownMeet** – the deliberate selection of a modest hotel in a small town destination in order to save money, ensure anonymity, and heighten the itinerary of the event
- **ResortMeet** – a seaside location for an end-of-summer thank-you meeting that combines business with informality
- **MetropolitanMeet** – the selection of a top cool city destination (e.g. Birmingham, Glasgow, Liverpool, Manchester, Newcastle) in order to underline the ambitious and youthful and energetic image of the company
- **SpeakerMeet** – a meeting that is largely inspirational – because a keynote speaker has been engaged
- **FestiveMeet** – choosing venues deliberately in the run-up to Christmas for a meeting that is part end-of-year assessment, part looking ahead, part treat, part meet

Determining if a Meeting is Necessary

Many of us are just in the habit of calling a meeting, or attending them even though we may not be required to do so, and we don't even think about the impact of doing so. Knowing when to call a meeting and when to have a telephone conversation or send an email can help break the habit of meeting for no clear-cut reason.

You should call a meeting:

- When you have been playing telephone tag and cannot get the action/decisions/input you require to take action, make decisions, or provide input.
- When the content of the communication is of a sensitive nature or could cause an emotional reaction on the part of the recipient.
- When an issue could be resolved in less time over the phone, e.g., clarification in print would take longer to type than to speak.
- When there is a history of miscommunication
- When there are multiple parties involved
- When you are not sure if email or telephone or paper-based communication will be delivered and/or received
- When action and timing are of the essence
- When you need a paper trail, and or documentation and/or participation is required

You might consider another mode of delivery for the communication:

- When whatever is being communicated is strictly information based and could be delivered effectively via email or telephone
- When you are upset, stressed, or angry
- When someone expected to attend the meeting is upset or angry
- When key contributors to the meeting are unavailable or absent
- When proper preparation has not been made, e.g., documents, notification of meeting time, date, location etc.
- When you are unsure what the purpose of the meeting would be; that is you'd just be talking with no specific goal in mind

Granularity (noun) Meeting jargon meaning detail. e.g., In this year's budget I'd like to see more *granularity* in our expense breakdowns. www.effectivemeetings.com

Organizing Meetings

Ask yourself, "Why do I go to meetings?" and "Why do I call/schedule meetings?"

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

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

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

- ❑ Ask for input of agenda items from those who will be attending.
- ❑ Order the items on the agenda. The most important ones are discussed first.
- ❑ Look for logical connections between agenda items and schedule them together.
- ❑ The agenda should be specific as to its purpose so participants can be prepared
 - ❑ with information for the meeting.
- ❑ List the time of the meeting, both start and finish, and the date and location.
- ❑ Decide if there has to be a minimum number of people present at the meeting (quorum) to deal with issues.
- ❑ Set out the rules according to your organization policy or formal meeting rules.
- ❑ The last step in organizing a meeting is to inform the participants.
- ❑ Circulate the agenda so that everyone is aware of the topics to be discussed and possible information that may be required from them during the meeting.
- ❑ Distribute previous minutes and appropriate documents needed by participants
 - ❑ in order to prepare to discuss agenda items.
- ❑ Confirm participants' attendance by telephone, e-mail, or fax.

NOTE: Managers and others who are organizing meetings should get in the habit of starting the meeting at the scheduled start time. Don't wait for the

late-comers. This sends a signal to people who are consistently late that they are not so important that the meeting will wait for them, and it rewards those who make an effort to be on time by not making them wait for those who are rude or disorganized and don't arrive on time.

Requirements of formal meetings

The formal process for presenting a motion is outlined following:

1. A motion is a proposal for action. The individual presenting a motion must first be given permission to speak by the presiding officer.
2. After an individual has voiced a motion, another individual must back the motion by addressing the presiding officer and saying: "I second the motion".
3. Orderly discussion takes place, with the chairperson giving permission to speakers on both sides of the motion to speak.
4. Amendments can be proposed, seconded, then discussed and passed before dealing with the full motion, as amended.
5. After a decision on motions, e.g., after a debate, motion is read, with any changes, and then a vote is requested, then taken, and the motion is passed or rejected.

Note: Formal meetings and protocols vary according to organizational structure and purpose of the meeting. Check to find out if there is orientation available on the type of meeting you will be attending.

Order of formal meetings

1. Start on time. The chairperson should arrive early so that the meeting can start on time.
2. The chairperson calls the meeting to order, asking for quiet and everyone's undivided attention.
3. Approve the agenda. Add or delete items as the participant's request.
4. Have the previous minutes read.
5. Discuss any outstanding items from the previous meeting.
6. Discuss approved agenda items.
7. Schedule the next meeting date.
8. Adjourn the meeting on time.
9. Distribute the minutes as soon as possible.

Participating in meetings

With tight deadlines and busy schedules having to attend meetings can seem time consuming and unproductive. However, actively participating in meetings can be beneficial for sales managers. Meetings provide opportunities to share

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ideas, keep up-to-date on goals and changes in the organization, and set priorities that help manage time more effectively.

If you are required to attend meetings, your participation includes reviewing the agenda and topics for discussion and showing up on time. You should participate in discussions, but do not dominate and avoid having side conversations. If you have been given action items during the meeting you must follow up with those issues prior to the next meeting.

There are 11 million business meetings every day in the US.

www.effectivemeetings.com

If you are chairing the meeting it is your responsibility to encourage participation by all attendees, keep discussions on track, curtail lengthy comments, summarize ideas, and provide minutes to participants after the meetings. Minutes should include follow-up actions and the next meeting date.

THINK ABOUT IT:

"Executives average 23 hours per week in meetings...
7.8 hours of the 23 are unnecessary and poorly run...
This equals 2.3 months per year."

from <http://www.mcnellis.com>

Researchers, Alexandra Luong and Stephen Rogelberg at the University of Minnesota did a study on meetings in 2006. Their results speak volumes. "It is impressive," Luong and Rogelberg write in their summary, "that a general relationship between meeting load and the employee's level of fatigue and subjective workload was found". Their central insight, they say, is the concept of "the meeting as one more type of hassle or interruption that can occur for individuals".



You can find templates for meeting minutes and other meeting documents at www.myworkplacetools.com

Regardless of what format you use to record the activities and action covered in meetings, the records and documents are most valuable when used- that is distributed to meeting attendees with action items clearly indicated and follow-up meeting dates included.

["According to most studies, people's number one fear is public speaking. Number two is death. Death is number two. Does that sound right? This means to the average person, if you go to a funeral, you're better off in the casket than doing the eulogy."](#)

~ Jerry Seinfeld

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As you climb higher on the corporate ladder and depending on your job title of course, you may be expected to chair more meetings and do more public speaking and/or presentations. It is absolutely essential that you learn how to overcome any fears you may have and that you practice presenting yourself in a competent, credible way.

Presentation Skills

Getting in front of a group to do a presentation can be a grueling experience. Once you get past your personal fear of speaking, there's the issue of how to get your message across while also considering group dynamics, outside influences and various measuring sticks for performance.

Following the tips below will bring even the most nervous speaker a bit of relief from the pre-presentation jitters.

- It takes most adults four to seven minutes to adjust to a speaker's style and most of us can really only focus and absorb 18 minutes of information. So, it makes good sense to make your points clear from the beginning. With such a short period of "reel in time" consider some serious pre-presentation practice on annunciating words and proper pronunciation. Consider having a co-worker give you feedback on your pace and tone.
- Try the "Three T's" theory. Tell the audience what you are going to tell them, tell them whatever it is, and then tell them what you have told them. Sometimes telling the audience the conclusion or benefits first draws them in and lets them focus on the content of a presentation rather than wonder about the conclusion.
- Anything can happen, so even if you are a practiced speaker, it is always best to get to the presentation site a little early, just to be sure you are prepared. Create a checklist for a quick review of the room set-up, sound and lights.
- Have you ever assumed at the end of your presentation that the group is leaving having completely understood your talk? Think again. Studies show that only two of ten people will ask for clarification, regardless of how important the topic. As the presenter, part of your job is to provide clarification. Ask your audience questions, wrap up each topic with a synopsis, and give ample time for discussion.
- Have you ever filled air space with rambling sentences out of fear that silence will give the audience the impression that you are lost and not sure about your topic? Sometimes purposeful pauses give listeners a chance to "catch up" with a speaker. Short periods of silence can give the impression that the speaker is gathering his/her thoughts carefully or preparing something meaningful to say.

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- Most people decide within the first couple of minutes whether or not you are worth listening to. Many people make judgments about a speaker's credibility or capabilities on the basis of visual and non-verbal cues. Watch your body language and remember that people will assume they know what you saying, or implying, just by observing your body language. Find someone you trust to indicate when your body language is sending signals that are confusing or that may suggest a negative vibe.
- Part of a presenter's job is to provide information and the goal is to provide information that is remembered after the presentation ends. Most of us retain less than 40% of what we hear during the day. That is why presentation aids like overheads, visuals, Power Point or handout materials are effective if you want to encourage retention.
- If you want to make each member of the audience feel included, try to look at each person or at an area of people (depending on the crowd) for a period of at least five to ten seconds. If you want to build lasting impressions and show people that you are really interested in their attention or feedback, direct eye contact will accomplish the task. If you are apprehensive or afraid they will think you are staring look first at the colour of their eyes and then their eye brows. Works like a charm and calms down those pesky stomach butterflies. There are five main areas where preparation aids in building confidence, yours and that of the audience. (To review expanded information on these 5 skill areas, please see the expanded lesson plan of for this content)

- ❑ Content
- ❑ Voice
- ❑ Eye Contact
- ❑ Body language
- ❑ Rehearse

What else can you do to eliminate the fear factors when public speaking?

It certainly helps to anticipate any potential problems that could arise before, during and after your presentation and do what you can to prevent any potential catastrophes. For example, think about those who will be attending. You can be sure they won't be listening to your speaking if they are not completely comfortable. Here are some things to consider:

Check the room in advance. Is it the appropriate size, shape, and location? It wouldn't be the first time a speaker found himself or herself at the "other" Holiday Inn across town or totally prepared for Thursday's presentation for 20 when it's Tuesday and they should be preparing for a theatre of 200.

Check the lighting. Will someone control lights during the presentation?

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This is particularly important if you are using a projector for a portion of the session.

Check the temperature. Too hot or too cold makes an audience too distracted to listen.

Check the seating arrangements. Can everyone see the podium from where he/she is seated? Are the exits readily available so that someone could leave if he/she had to without disrupting the whole session?

Check the technical details. Is there a podium? A microphone? Is your audiovisual equipment on the premise and operable? Definitely make a point of checking that everything is in working order before the presentation.

Stay on time. Make sure you have timed your presentation suitably.

If it is a long session, arrange for periodic breaks so that guests may stretch or use the washroom etc. If meetings are scheduled very early, make sure there is food or beverage available to guests so they are not distracted by hunger pains. Finally, follow the agenda closely, everyone is busy and regardless of how great your speech is, all they'll remember is that you were longwinded if they're late for an afternoon meeting because you spoke overtime.

Be available for questions and discussion. Be very clear at the beginning and throughout your presentation as to whether or not and when you will be available to take questions from the floor. Don't invite interaction unless you are prepared to follow through and make sure you have the gumption to reign the audience back in if you get off track. If the session is not one that warrants a question and answer period, mention to attendees that you appreciate their interest and will be available for questions or feedback after the session or by email, telephone or fax the following day.

It's true, sometimes no matter how hard you try and how careful you are, something unexpected is going to happen. Once again, don't panic! Things are generally not as bad as they seem to be and most every situation can quickly be repaired with some quick thinking and maintaining a sense of humor. Things always appear far worse to the speaker and the event organizers too. Most often "the crisis" at hand is hardly noticed by the group. The best advice is to remember is how you handle blunders and mishaps will determine whether or not you are remembered for the blunder or for your overall presentation.

And what if the worst happens?

Even if you have done your homework, checked and double-checked the venue, rehearsed until you cannot rehearse anymore, the worst could still happen. So, planning for the worst is the only thing you can do.

If you would like an expanded version of this brief, please visit www.etiquettetrainingtoolkits.com where you can purchase this and 140+ additional civility and etiquette lessons and other materials.