



# The Leadership Institute

*Lighting the Way*

## HOLDING AN EFFECTIVE MEETING

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Written by  
**Charlie Dellatore**  
The Leadership Institute



### Participant Module



The Leadership Institute

*Lighting the Way*

*“Inspiring Dreams, Realizing Potential”*

# HOLDING EFFECTIVE MEETINGS

WELCOME

OVERVIEW

## 1. WELCOME

## 2. OVERVIEW

We all have them. Sales meetings, client meetings, meetings with our boss, meetings with chamber organizations. Meetings, meetings, meetings! A network MCI report recently estimated that over 11 million meetings occur every day in the United States.

But how many of them make an impact? How many meetings truly accomplish a goal, or more specifically, how many of them accomplish their intended goal?

Meetings are like anything else in our lives. If we aren't taking the time to examine their effectiveness and their usefulness, then oftentimes, they are effective nor useful.

How is it possible that many of us have achieved to the level we have and so few of us have actually been instructed on how to conduct an effective meeting? And more importantly, how do our meetings affect those with whom we are meeting?

Here are some of the ways unproductive meetings affect our office:

- ✓ Unproductive meetings are morale crushers.
- ✓ Meetings are longer, less productive, and generally leave us feeling like some, if not all, of our time has been wasted.
- ✓ More meetings must be held to accomplish objectives.
- ✓ Employees have less time to do their own work.
- ✓ Ineffective meetings cause frustrations at all levels.

What do all of these things have in common?

**They all create a loss of revenue.**



# HOLDING EFFECTIVE MEETINGS

**MONEY ISN'T  
JUST A PINK  
FLOYD SONG**

**HOW DID THIS  
PROBLEM  
BECOME SO  
SERIOUS?**



*Money* isn't just a Pink Floyd song. Some way, somehow, these inefficiencies are costing our organizations thousands and even hundreds of thousands of dollars each year. Recent studies have shown that unproductive meetings may account for billions in lost revenue every year.

Obviously, if we had a situation within our office where thousands and thousands of dollars were being wasted, we would work frantically and diligently to find a way to eliminate that problem. Most likely, your meetings *are* costing you money, and the resources you exhaust every time you meet, *are not* being used to their fullest potential.

**How did we get here? How did this problem become so serious?**

- ✓ Lack of training—Many of us simply do not know how to conduct an effective meeting.
- ✓ Convenience plays a role.
- ✓ We are all so wrapped up in just getting by, this is the last area we think to improve.
- ✓ Many of us do not know, understand or consider what the negative impact of ineffective meetings has on our operations.

Now what? Where do we go from here?

**The answer lies in three main areas:**

1. Self evaluation
2. Training
3. Application and commitment

# HOLDING EFFECTIVE MEETINGS

## SELF EVALUATION

### 3. SELF EVALUATION:

It's time to take a hard look at what you're doing and how you're doing it. From the weekly sales meetings to the monthly collection meeting, it's time to audit your situation. This is one of the most difficult steps, but essential to any type of improvement. Take some time and analyze whether or not your current meetings meet the criteria for an effective meeting, which are communicating, administering, and deciding, with the overall focus being action. These items are the backbone and the essential ingredients that all successful meetings share. Involve members of your staff and ask them their opinions. If you don't know what you're doing poorly, how can you ever get better?

## TRAINING

### 4. TRAINING:

Spending the time learning the techniques required to create and manage an effective meeting is critical. Learn what it takes to create situations where your employees are participating and involving themselves in your meetings. There are some great resources you can utilize beyond this course that can educate you how to conduct an effective meeting. Your local library and bookstores have plenty of options to consider. Here are a couple of books to keep in mind:

“Better Sales Meetings in 3 to 30 Minutes,”  
by Malinda A. Terreri & Hutch Graphics

“Sales Meetings that Work: Planning and Managing Meetings to Achieve Your Goal,”  
by Richard Cavalier

Spend some time on the Internet researching ways to improve your meetings. With gobs of websites available on the subject, take a look at a few that really strike a cord with your office environment.



# HOLDING EFFECTIVE MEETINGS

## APPLICATION & COMMITMENT

### 5. APPLICATION & COMMITMENT:

For many of us, this is where the actual work comes into play. Remember that complacency is what gets into this predicament in the first place. We are all comfortable with how we do things. All the self evaluation in the world and expenditure of thousands of dollars for training and learning will be useless, unless you commit yourself to making a difference. Changing is hard work. Applying what you've learned and practicing those principles is the only way to create new habits—hopefully productive ones.

### How do we start improving our situation?

Following in the great footsteps of David Letterman and the sporting giant ESPN, the following is your Top 10 list for every meeting! These are not suggestions or clichéd little thoughts that are designed for you to consider when planning a meeting. These are Mandates, Laws, Commandments or whatever word you want to use that makes you understand that all 10 MUST be used for your meetings to be as effective as they can be!

### DELATORRE'S TOP 10:

#### #10: You will ALWAYS know what time it is.

You've been in the meeting for 47 minutes and it feels like 47 hours; We have all felt that way. As a matter of fact, studies show that professionals who meet regularly admit to:

- ✓ *Daydreaming- 91%*
- ✓ *Missing Meetings- 96%*
- ✓ *Missing Parts of Meetings- 95%*



A large percentage (73%) admit to bringing other work to the meeting and 39% admit to dozing through the meeting. Meetings often take much longer than they should for a variety of reasons. Regularly scheduled meetings often take much longer than anticipated. Keep your meeting running smoothly and on target. If issues arise that are not pertinent to the meeting's purpose, table that issue for another meeting.

# HOLDING EFFECTIVE MEETINGS

## DELATORRE'S TOP 10



### **#10: You will ALWAYS know what time it is. (*cont'd...*)**

Always be clear and accurate as to how long the meeting will last. You will lose credibility with the meetings attendees if you mislead them about the time. Be reasonable about the time. Don't say a meeting will take 10 minutes and then keep them there for 40! Be realistic!

### **#9: You will never forget the main reason for the meeting!**

Meetings have 3 purposes: Communicating, Administering and Deciding—with the overall focus being ACTION. Solving a problem is your goal with every meeting you conduct, and all three of the purposes we mentioned should focus on the action side of solving that pre-determined program. Meetings often go astray as topics arise that do not serve one of these three purposes. Always be mindful of where the meeting is going. Stay on target!

### **#8: You will ALWAYS praise in public and coach in private.**

The power of praise looms large; the power of public criticism looms larger. Do not use meetings as a forum for public criticism. It undermines Promise #9 and undermines any and all "Team" concepts you have tried to develop. Coaching an employee to perform better, to improve themselves and their productivity is a necessary task, but not one that should be done in a general meeting. Putting someone on the spot will not will not accomplish the any of your 3 main purposes and you will never garner the support you'll need to create effective action. Most people want to know what they can to improve themselves, but they don't want everyone to hear it.

# HOLDING EFFECTIVE MEETINGS

DELATORRE'S  
TOP 10



## **#7: You will not convene meetings outside of business hours.**

Sometimes business situations arise that will make this promise difficult to maintain; it should be broken in only the rarest of occasions. Asking employees to work weekends or evenings when that is not their normally scheduled time to work will not end well. Even though we may pretend that we want employees whose sole existence is to better our business, the truth is, all of our employees have lives outside of the workplace. Asking them to give up their lives any more than they already do will probably backfire.

## **#6: You will always keep the personal, personal, and business, business.**

This is a major issue in many of our smaller offices. The wise step here is to adhere to the promise at all times. In so many small offices, we tend to make friends where we work, and that's fine. However, using personal information in a public meeting can never be useful. Too much socializing in a meeting will lead to resentment and the perception of "clicks" within the office. It's ineffective and bad for business. Too much socializing equals bad meetings. Remember some of the other promises to this point. Mentioning personal information will never keep meetings running smoothly and on target. Time is a limited resource that cannot be wasted in this manner.

## **#5: You will always prepare a clear agenda.**

This is one of the biggies. More meetings fail to accomplish the three purposes (communicating, administering, and deciding) because clear agendas are not prepared in advance. Know what you are going to talk about before the meeting. Do not "wing it." If possible and appropriate, write it down, type it up and distribute it before the meeting. By providing the agenda, people will be more prepared for what will be said and more can be brought to the table. We tend to underestimate the amount of time it takes to effectively plan a meeting; at the last minute, we are running around, throwing some ideas together and hoping this will accomplish something. Know what you are going to say and then say it.



# HOLDING EFFECTIVE MEETINGS

DELATORRE'S  
TOP 10



## **#4: You will get them involved.**

This is the “two heads are better than one” theory. You have these people with you for a reason. Get them involved in the meeting. Nothing will seem more boring, mundane and be less effective than someone who spends the entire meeting talking without involving the other members of the meeting. If two heads are better than one, then the more heads the better. Remember the purposes outlined above. More people involved will guarantee and will provide you with greater participation. The more participation you have, the more likely you will be able to create action towards solving a problem.

## **#3: You will be visual.**

A 3M Corporate study shows that meetings with some type of visual aid are 43% more effective. Use some type of visual throughout the meeting. Most of us are visual learners and without utilizing that fact, many of our meetings are less effective. Pictures, Power Point presentations, graphs, tables and anything that helps attendees “see the point,” will make advance your meetings and increase their effectiveness. Get creative with what you bring to the meeting.

## **#2: You will terminate a regularly scheduled meeting when its purpose for being no longer exists.**

Don't continue to have meetings simply because you said you were going to have one. Make a promise to yourself and to your employees that when a meeting ceases being useful or no longer accomplishes any of the goals, that you will end it. And it's OK not to have meetings. Things change everyday. The meeting may no longer be needed or you may have found some way to accomplish the stated goal. In either case—LET IT GO! Time is too valuable—yours and your staff's. If you can no longer state the purpose of the meeting, end it.



# HOLDING EFFECTIVE MEETINGS

## SUMMARY

### #1: You WILL have fun!

Make the meetings fun. Nobody likes coming to a meeting where the same old thing happens every time. Shake it up a bit and make the time enjoyable and productive. Meetings provide us with a unique opportunity. Take advantage of the situation by enjoying the time together.

## 6. SUMMARY

- ✓ Remember your meetings are most likely costing you money!
- ✓ Meetings have 3 purposes—Administering, Communicating and Deciding.
- ✓ Evaluate, train, apply and commit your self to improving.
- ✓ Follow Delatorre's Top 10.
- ✓ Have Fun!

## QUESTIONS & DISCUSSION

On behalf of The Leadership Institute, thank you for attending this class. We believe that the continued growth of the free paper industry begins with a well-trained, energized sales force.

For more information on TLI's course offerings, check out the [afcpconference.org](http://afcpconference.org) website.

*"I know the price of success: dedication, hard work and an unremitting devotion to the things you want to see happen."  
—Frank Lloyd Wright*

