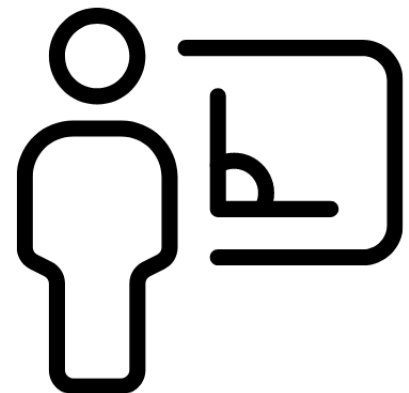


Instructors Guide



On the following pages is a sample module from our Instructor Guide. It provides the instructor with a copy of the material and a Lesson Plans box.

The key benefit for the trainer is the Lesson Plan box. It provides a standardized set of tools to assist the instructor for each lesson. The Lesson Plan box gives an estimated time to complete the lesson, any materials that are needed for the lesson, recommended activities, and additional points to assist in delivering the lessons such as Stories to Share and Delivery Tips.



*There are two ways of meeting difficulties:
You alter the difficulties or you alter
yourself to meet them.*

Phyllis Bottome

Module Two: Planning and Preparing(I)



The first step in making your meeting effective begins with your planning and preparation activity. Determining the purpose of your meeting, who should attend, and the location of the meeting, will form the foundation on which you will build your agenda, decide what materials you need, and identify the roles each attendee will have in the meeting. Sufficient planning and preparation will help reduce any stress you may experience from managing a meeting.

This module is part one of your planning session, which focuses on important factors that could affect the success of your meeting: the **people**, **place**, and **purpose** of the meeting.

Identifying the Participants



Determining who attends the meeting is an important first step in preparation. Your tendency to include all employees in an effort to cover all angles could alter the meeting dynamics. Before you decide who to invite, be specific about the purpose of the meeting. For example, if you are meeting to resolve a problem, invite only those who are capable of providing solutions to that problem. Avoid inviting a high-ranking manager who could thwart solutions before they are developed.

On the other hand, if the purpose of the meeting is to make a decision on a policy or product, do not invite people who do not have the power to enact those changes. Including people who cannot contribute to the meeting will leave them feeling excluded which may affect the meeting environment. Identifying the purpose of your meeting first will help to determine who should attend.

The following are some common reasons to call a meeting:

- Problem solving
- Decision making
- Conflict resolution

- Project initiation
- Planning
- Brainstorming

Once you determine your meeting purpose, list the participants you want to attend, and then determine what each participant will contribute to the meeting. If a participant is deemed a non-contributor, they should be removed from the list. When all non-contributors are removed, you will be left with a list of the people that should be included in your meeting.

Estimated Time	15 minutes
Topic Objective	Participants will learn how to determine who should attend the meeting.
Topic Summary	Identifying the right participants for your meeting is essential to the meeting dynamics.
Materials Required	Worksheet 1: Meeting Participants
Planning Checklist	Have enough worksheets for all participants. Worksheets are provided in the Appendix of the Training Manual
Recommended Activity	<ul style="list-style-type: none"> • Form groups of 4 to 5 participants • Designate a group leader • Distribute worksheet to all participants • Tell participants that they are going to plan a meeting • Have participants individually determine who in their organization should attend their meeting based on the information on the worksheet • Allow 2-3 minutes • Have each participant share with their group the reasons they selected these people • Have the group leader jot down reasons shared by their tablemates • Have the leader share their table's reasons with the entire group • Ask, "What thoughts would you like to share about using this worksheet?"
Stories to Share	None
Delivery Tips	None
Review Questions	Q: What challenges did you encounter when determining who should attend

	<p>your meeting?</p> <p>A: Answers may vary</p>
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Choosing the Time and Place



There are several considerations when planning the time and place of your meeting. For instance, the time of day is essential if your meeting is meant to be a brainstorming session or problem-solving meeting. Setting these types of meetings right after lunch or late in the day could be a frustrating experience. After lunch people tend to be lethargic, and meetings at the end of the day are plagued with participants looking at the clock in anticipation of leaving work and going home.

Meetings that require energy and a high level of participation are best scheduled between 8 and 9 in the morning. Most workers are not engaged in their daily work yet so you will have their attention and energy at the meeting. The next best time is around 3 PM. This gives your participants enough time to recuperate from their lunchtime meal and offers at least an hour of cushion before they start thinking about going home. Meetings that are low key could be scheduled anytime during the day. Just remember not to schedule them too close to lunch or near the end of the workday.

Location is also important. Try to schedule your meeting in a well-lit, spacious room. If possible, get a room with windows. Dark and cramped rooms will bog down your meeting, as some people may feel claustrophobic and distracted by their surroundings. Other considerations are the need for privacy if the meeting topic is of a sensitive nature, having a room with more privacy will make participants more comfortable. And if you plan to have an outside visitor attend your meeting, situate your meeting near the main entrance. This way your visitor does not have to search for the meeting.

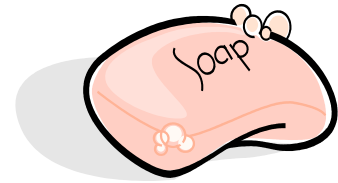
Estimated Time	15 minutes
Topic Objective	Participants will learn to strategically select the best time and place for their meeting.
Topic Summary	The time and the place of your meeting could help your meeting be more successful.
Materials Required	Worksheet 2: Meeting Time & Place
Planning Checklist	Have enough worksheets available for all participants (Appendix)
Recommended Activity	<ul style="list-style-type: none"> • Distribute worksheets • Tell participants to use the worksheet to determine the time and place of their meeting planned in the last activity

	<ul style="list-style-type: none"> • Allow 2-3 minutes • Ask for volunteers to share the time and place they selected for their meeting • Go around the room several times <p>Facilitator Note: Avoid correcting those participants that may choose a poor time or place. During activity, monitor room for those who are struggling. Ask questions about their workplace and gather ideas on the best places to hold a meeting based on the type of participants.</p>
Stories to Share	None
Delivery Tips	None
Review Questions	<p>Q: Why is the time and place of your meeting so important that it should be planned?</p> <p>A: The time and place could affect the energy level of the meeting.</p>

Creating the Agenda

Creating the agenda can be easy if you know what to do in advance. The **SOAP** technique helps to collect the topics, organize them, and determine which will contribute the most to your meeting.

- **Seek topics from your participants:** Send an email to the list of participants you created, asking for agenda topics. Give a brief explanation of the purpose of the meeting and an idea of what you are looking for in terms of topics. Do not make this the formal invitation. When you send the request, ask the participants to indicate what time will work best for them and how much time they anticipate they will need to discuss their topic. Provide a deadline for when you will need this information so you can begin to plan the agenda.
- **Organize topics into a list:** Once you receive the topics, organize them into a list along with the time and the name of the presenter. This will give you the ability to scan through the list, narrowing it down to the topics you will select for the agenda.
- **Assess which topics are relevant to the meeting purpose:** With your list organized, determine which topics are the most relevant to the purpose of the meeting. Scratch out those topics you do not intend to use.
- **Pick the number of relevant topics that will fit into your meeting time:** Review the time of the remaining topics. Select enough topics to fill the time of your meeting, minus ten minutes. Give



yourself ten minutes for meeting overrun. If you go over, you will end on time. If you do not, then you get to adjourn your meeting early, making everyone happy.

Remember to contact the presenter that had their topic removed from the agenda, explain the reason why it was not put on the agenda and recommend that topic be saved for another meeting.

Estimated Time	15 minutes
Topic Objective	Participants will learn how to create an agenda using SOAP technique.
Topic Summary	<p>SOAP stands for the following steps:</p> <ul style="list-style-type: none"> • Seek topics from your participants • Organize them into a list • Assess which topics are relevant to the meeting purpose • Pick the number of relevant topics that will fit into your meeting time
Materials Required	Worksheet 3: SOAP and Agenda Template . Worksheet 4: List of Topics
Planning Checklist	Prepare enough job aids, templates and topic lists for all participants
Recommended Activity	<ul style="list-style-type: none"> • Distribute SOAP, Agenda template and List of Topics • Have participants work in pairs • Have participants determine which topics belong on the agenda by using SOAP • Allow seven minutes to complete • Have participants voluntarily share their agenda with the class • Ask, “What thoughts can you share about using the SOAP technique?” <p>Facilitator Note: During the activity, walk around the room and help those who are having trouble with the job aid and template. Remember not to directly criticize a participant whose agenda list contains unrelated topics. Instead, have another participant share and reinforce them if it is correct.</p>
Stories to Share	None
Delivery Tips	None
Review Questions	Q: Why should we consider the agenda the most important document at your meeting? A: <i>It communicates information; it is an outline, it serves as a checklist, and it gives focus to meeting.</i>

Practical Illustration



Caroline sought Gretchen out after a meeting and said, “Gretchen, I wanted to tell you how much I enjoyed that meeting. It ran very smoothly, and I appreciate that it ended on time.”

Gretchen nodded. “I took some extra time to plan, with the hope that it would run smoothly. Thank you for saying so.”

“I have an upcoming meeting to prepare for” Caroline said. “It’s my first. Would you be available to offer me some pointers?”

Gretchen assured Caroline that she would be more than happy to help her with some tips for preparing an impressive first meeting.

Module Two: Review Questions

- 1) Who should you invite to meetings?
 - a) High-ranking managers
 - b) All the interested employees
 - c) People compatible with the meeting's purpose
 - d) Everybody, in order to explore all the options

Before you decide who to invite, be specific about the purpose of the meeting.

- 2) Which of the following is an occasion for a meeting?
 - a) Brainstorming
 - b) Project initiation
 - c) Planning
 - d) All of the above are occasions for a meeting

All of the options are appropriate occasions for meetings.

- 3) Meetings that require energy and a high level of participation are best scheduled:
 - a) Between 8 and 9 am
 - b) Between 10 – 12 pm
 - c) Between noon and 2 pm
 - d) After lunch

Meetings that require energy and a high level of participation are best scheduled between 8 and 9 in the morning.

- 4) Which of the following is an important factor when it comes to the place of the meeting?
 - a) Light
 - b) Size
 - c) Windows
 - d) All of the above are important factors

Try to schedule your meeting in a well-lit, spacious room. If possible, get a room with windows.

5) What's the best way to organize topics?

- a) Simple list
- b) Chart
- c) Multimedia presentation
- d) Mind map

Organize them into a list along with the time and the name of the presenter. This will give you the ability to scan through the list, narrowing it down to the topics you will select for the agenda.

6) What is the name of the technique used for organizing the topics?

- a) SPONGE
- b) SOAP
- c) BRUSH
- d) FOAM

The SOAP technique helps to collect the topics, organize them, and determine which will contribute the most to your meeting.

7) What's the most secure way to make sure you won't run over the time of the meeting?

- a) Giving up a topic or two if you realize you will overrun the time
- b) Choosing topics that will fill the time of the meeting and adding extra 10 minutes
- c) 'Compressing' the topics
- d) Talking fast

Review the time of the remaining topics. Select enough topics to fill the time of your meeting, minus ten minutes. Give yourself ten minutes for meeting overrun. If you go over, you will end on time. If you do not, then you get to adjourn your meeting early, making everyone happy.

8) What's the most important factor when you need to pick the topics?

- a) Their complexity
- b) Their compatibility with participants
- c) Their relevancy
- d) Their expected results

Choosing topics that will fill the time of the meeting and adding an extra 10 minutes.

9) What do you do with the topics that will not be discussed during the meeting?

- a) Throw them away
- b) Explain that they won't be submitted this time, but will be filed for future meetings
- c) Ignore them
- d) Offer them to someone else

Remember to contact the presenter that had their topic removed from the agenda, explain the reason why it was not put on the agenda and recommend that topic be saved for another meeting.

10) What are the **3 Ps** of the planning session?

- a) Paper, prosper, patience
- b) People, place, purpose
- c) Present, place, purpose
- d) Purpose, people, patience

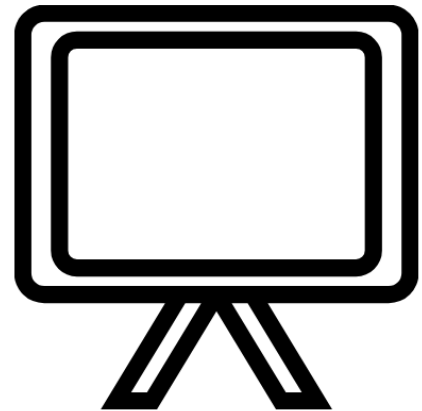
Important factors that could affect the success of your meeting: the **people, place, and purpose** of the meeting.

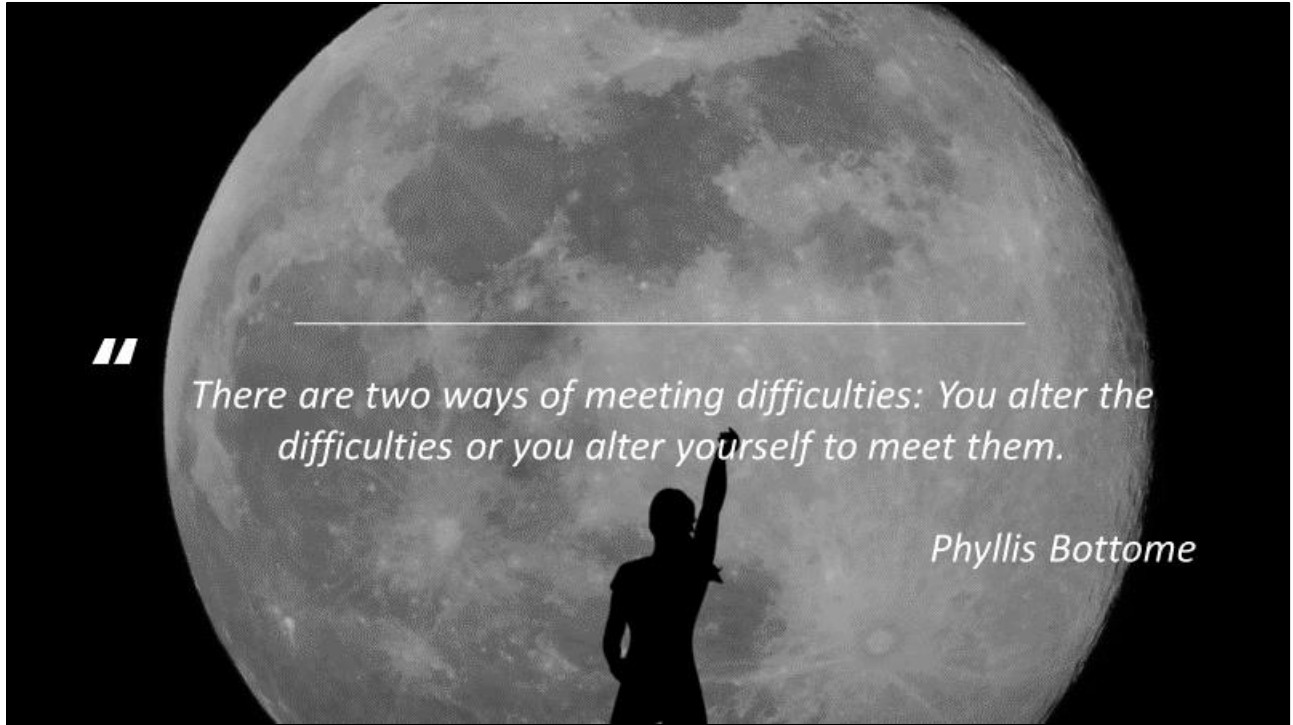
PowerPoint Slides



Below you will find the PowerPoint sample. The slides are based on and created from the Instructor Guide.

PowerPoint slides are a great tool to use during the facilitation of the material; they help to focus on the important points of information presented during the training.





“

There are two ways of meeting difficulties: You alter the difficulties or you alter yourself to meet them.

Phyllis Bottome

MODULE TWO

Planning and Preparing

Sufficient planning and preparation will help reduce any stress you may experience from managing a meeting.



Identifying the Participants

Problem
solving

Decision
making

Project
initiation

Brainstorming

Choosing the Time and Place

Meetings that require energy and a high level of participation are best scheduled between 8 and 9 in the morning.





Creating the Agenda

- Seek topics from your participants
- Organize topics into a list
- Assess which topics are relevant to the meeting purpose
- Pick the number of relevant topics

Practical Illustration



- Identifying the Participants
- Choosing the Time and Place
- Creating the Agenda

Module Two: Review Questions

1. Who should you invite to meetings?

A. High-ranking managers

B. All the interested employees

C. People compatible with the meeting's purpose

D. Everybody, in order to explore all the options

Quick Reference Sheets



Below is an example of our Quick Reference Sheets. They are used to provide the participants with a quick way to reference the material after the course has been completed. They can be customized by the trainer to provide the material deemed the most important. They are a way the participants can look back and reference the material at a later date. They are also very useful as a take-away from the workshop when branded. When a participant leaves with a Quick Reference Sheet it provides a great way to promote future business.



Meeting Management Quick Reference Sheet



Gathering Materials

Organizer: Using an organizer like a portable accordion file or Pendaflex is an easy way to file your handouts and other stationary materials in one container.



Special requests: Ask your presenters ahead of time for special requests.



Stationary: This is all the paper you will need at the meeting. It includes, note pads, sticky notes, index cards, envelopes, tape, paper clips, folders, and flip chart.



Writing tools: This includes pens, markers, highlighters, and dry erase markers you may need for your meeting.



Handouts: Many times, you or your presenters will need to distribute handouts.



Making Logistical Arrangements

Physical space: consider the space in which you plan to hold your meeting.

- Is it on site or off site?
- Does it need to be set up?



Travel: identify who will need to travel to your meeting.

- Do they need travel arrangements?
- Do they need transportation to and from the meeting location?



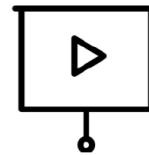
Food: determine if you need to organize meals.

- Is your meeting starting early in the morning and you need to serve a light breakfast?
- Are you going to cater food?



Audio and visual: later there will be a discussion on electronic options; however, if you plan to use electronics like a presentation or video,

- Do you have to get this placed in the meeting room?
- Are you savvy enough in troubleshooting technical problems or do you need a technical assistant?



Signage:

- Do you need to get signs, posters, special handouts made up for your meeting?



Variations for Large and Small Meetings

Large meetings present very different dynamics than smaller meetings. Managing a larger meeting requires more resources and assigned roles. If you are chairing the meeting yourself, you will need to rely on others to ensure all things are well executed.



On the other hand, in **small meetings**, you can assume multiple roles. For example, you can be the chairperson, technical person, and the minute taker in a small meeting. Small meetings are less formal and you can leverage the informal environment to multitask.

You may need an assistant if the meeting is comprised of important people. In any situation, careful planning and assessing the risk of working with less roles will help you to determine what roles need to be filled. When in doubt, get more help. Err on the side of caution.

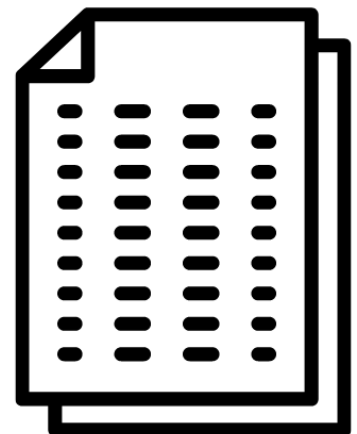
Handouts



Each course is provided with a wide range of worksheets.

Worksheets help check your participants' understanding. If a lesson calls for a worksheet, it will be listed in the Lesson Plan box under Materials Required. All worksheets are customizable and can be found in the Appendix of the Instructor Guide and the Training Manual.

As a trainer, icebreakers give your participants the opportunity to get to know each other better or simply begin the training session on a positive note. Icebreakers promote collaboration, increase engagement, and make your training more light-hearted and fun. Below is an example from the Icebreakers folder.



Sample Worksheet 1

Meeting Participants



Meeting Manager		Date	
Type of Meeting <small>(circle one)</small>	Problem Solving	Decision Making	Conflict Resolution
	Project Initiation	Project Planning	Brainstorming
	Other		
Purpose of Meeting			
Goal or expected outcome of Meeting			
Initial Meeting Data			
Meeting Date		Meeting Length	
Meeting Participants			
Role	Participant Name	Why they should attend	On Agenda Y/N
Chairperson			
Minute-taker			
Attendee			
Attendee			
Attendee			
Attendee			

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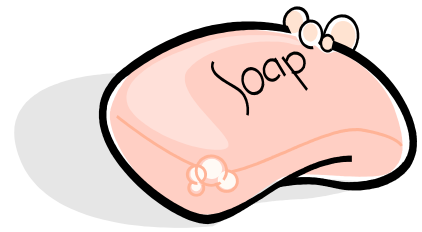
Sample Worksheet 2

Meeting Time & Place

Meeting Manager		Date	
Type of Meeting <small>(circle one)</small>	Problem Solving	Decision Making	Conflict Resolution
	Project Initiation	Project Planning	Brainstorming
	Other		
Purpose of Meeting			
Goal or expected outcome of Meeting			
Meeting Time & Place Survey <small>(Circle all that apply)</small>			
Morning	Afternoon	Onsite	Offsite
Brainstorming	Update Meeting	Internal Employees only	Many External Visitors
Conflict Resolution	Project Planning	Some External Visitors	Large Group
Problem Solving	Project Initiation	Small Group	We do not have a large meeting room
High Energy Needed	Low Energy Acceptable	We have a large meeting room	Our meeting rooms are not comfortable for meetings over two hours
All-Day Meeting		Our meeting rooms are comfortable to be in for more than two hours	This is a special meeting with lunch provided
This is an all-day meeting		This meeting is less than four hours	This is a long meeting (six to eight hours)

Finalized Meeting Time & Place			
(Time and Place with the most checks should be your best options)			
Time of Meeting		Date	
Onsite Location		Offsite Location	
Total Attendees		Cost of Venue	\$
Other Meeting Information			
Breakfast Provided	Y/N	Budget/Cost	\$
Lunch Provided	Y/N	Budget/Cost	\$

SOAP

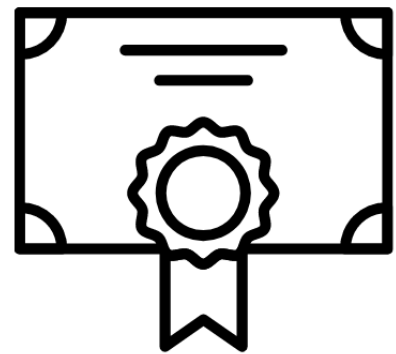


- **Seek** topics from your participants: send an email to the list of participants you created, asking for agenda topics. Give a brief explanation of the purpose of the meeting and an idea of what you are looking for in terms of topics. Do not make this the formal invitation. When you make the request, make sure you ask the participants for the time they need to discuss their topic, and provide a deadline to get their topic to you so it can be included on the agenda.
- **Organize** topics into a list: once you receive the topics, organize them into a list along with the time and the name of the presenter. This will give you the ability to scan through the list, narrowing it down to the topics you will select for the agenda.
- **Assess** which topics are relevant to the meeting purpose: with your list organized, determine which topics are the most relevant to the purpose of the meeting. Scratch out those topics you do not intend to use.
- **Pick** the number of relevant topics that will fit into your meeting time: Next, review the time of the remaining topics. Select the enough topics to fill the time of your meeting minus ten minutes. Give yourself ten minutes for meeting overrun. If you go over, you will end on time. If you do not, then you get to adjourn your meeting early, making everyone happy.

Certificate of Completion



Every course comes with a Certificate of Completion where the participants can be recognized for completing the course. It provides a record of their attendance and to be recognized for their participation in the workshop.



CERTIFICATE OF COMPLETION
[Name]

*Has mastered the course
Meeting Management*

Awarded this _____ day of _____, 20____

Presenter Name and Title
