Meeting Planning and Execution

BY JOAN BURGE, founder and CEO
Office Dynamics, Ltd.
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Visionary - Joan Burge, a renowned author and administrative expert, has been a visionary for administrative training and development since 1990. One of the first to venture into the administrative training industry, she has become an international administrative expert, trainer, author, and consultant. Joan equips executive assistants, administrative assistants, and office support professionals to move beyond task work to higher-level functions that meet the ever-changing demands of today’s workplace. Joan also coaches C-level executives on strengthening their relationship with their executive assistant.

In January 2010, Joan had a vision for redefining the administrative profession for the new decade while offering free education to administrative professionals worldwide. As a result she created Adminology™.

Architect and Course Developer - Best known for her highly-acclaimed Star Achievement Series®, a 12-part Certification and Designation (CEAP) training program designed to promote “Star Performance” among administrative, support and front-line staff. She is the creator and host of the Annual Conference for Administrative Excellence™, the World Class Assistant™ Certificate program, and more than 40 customized workshops and seminars for administrative professionals.

Accomplished Author - Joan’s newest release (2009) Underneath It All . . Postgraduate Level Revelations Lift Administrative Assistants to New Heights joins her groundbreaking book, Become an Inner Circle Assistant, 3 other books and 15 workbooks. She is the editor of Monday Motivators™ weekly e-zine and has been published in more than 200 trade journals.

Professional Speaker and Trainer - Joan takes her career seriously. She has mastered combining platform skills with facilitation skills to deliver dynamic workshops, seminars, keynotes, and programs.

Premier Clients - Joan’s never-ending quest for providing top-notch educational programs has earned the respect of premier clients like: Cisco, Boeing, Humana, Sunoco, Procter & Gamble, Nationwide Insurance, and Plante & Moran PLLC.

Active Learner - She is a member of the American Society for Training & Development, National Speakers Association Las Vegas Chapter, Society for Human Resource Management, and Las Vegas Chamber of Commerce.

Hands-on Experience - Before starting Office Dynamics, Joan worked in the administrative profession for 20 years in 12 different companies in 5 states. She worked her way up from Receptionist to assisting CEOs, serving in a variety of industries ranging from small businesses to Fortune 500 companies.
Approximately 11 million meetings occur in the U.S. each day. Most professionals who meet on a regular basis admit to daydreaming (91%), missing meetings (96%) or missing parts of meetings (95%). A large percentage (73%) say they have brought other work to meetings and 39% say they have dozed during meetings. USA Today stated the reasons meetings have increased are due in part to the rise in teams and requisite team meetings and technology such as video-conferencing accommodating slashed travel budgets.

Is it time to get your participants ENGAGED?
Core Essentials

- Good Communication Skills
- Organizational Skills
- Critical Thinking Skills
- Problem Solving & Decision Making Skills
- Ability to See the Big Picture
- Attention to Detail

Visualize How All the Pieces Will Connect
Meeting Stages

- Pre
- Proper
- Post

“Coming together is a beginning. Keeping together is progress. Working together is success.” – Henry Ford
Excel at Meeting Preparation

- Room location
- Notify participants
- Written confirmation
- Organizing meeting materials
- Prepare meeting room and visual aids
- Special needs
- Security
Organizing Your Meeting Materials

- Identify the objective for your meeting.
- Distribute an agenda to participants before the meeting.
- Give participants at least one day’s notification.
- Participants should know what is expected of them.
- Limit attendance and designate a leader.
- Set time limits for the meeting and each topic to be covered.
- Distribute materials in advance if at all possible.
- Let participants know about outcomes.

“Planning is bringing the future into the present so that you can do something about it now.”
-- Alan Lakein
Post Meeting

• Send recap of meeting or minutes.
• Confirm tasks assigned to attendees and deadline dates.
• Send thank you notes.
• Transfer action items to follow-up lists, calendars, and “to-do” folder.
• Update your calendar with future meeting dates.
• Put files away that you took to the meeting.
• Send necessary information to non-attendees or tell alternate’s team leader.
• Get feedback from attendees.

• Keep attendees informed of the status of projects discussed in meeting.
• Clean up conference room and return all equipment.
• Conduct a meeting survey.
• Make note of “personal lessons learned.”
Expectations Today

- Data Mine
- Filter/Narrow
- Organize Final Information
- Vocalize Findings to Leader
Web Resources

- [MeetingPlanningResources.com](http://MeetingPlanningResources.com) Meeting planning tips & toolbox has items like a meeting flowchart and sample agenda – you can even calculate the cost of inefficient meetings at your company.

- [Office.Microsoft.com](http://Office.Microsoft.com) for meeting agenda and minutes templates.

- [EffectiveMeetings.com](http://EffectiveMeetings.com)

- More Tips for Meeting Management
Other Resources

- *Meeting & Event Planning for Dummies* by Susan Friedmann
- *Event Planning: The Ultimate Guide to Successful Meetings, Corporate Events, Fundraising Galas, Conferences, Conventions, Incentives and Other Special Events* by Judy Allen
- *Successful Meetings: How to Plan, Prepare & Execute Top-Notch Business Meetings* by Shri L. Henkel
- *The Complete Conference Planner* available through ExecutivEvents.com

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## You As a Meeting Facilitator

<table>
<thead>
<tr>
<th>Pre Meeting</th>
<th>Meeting Proper</th>
<th>Post Meeting</th>
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<tbody>
<tr>
<td>Set agenda.</td>
<td>Take the lead.</td>
<td>Send recap of meeting minutes.</td>
</tr>
<tr>
<td>Send agenda to attendees at least one week out.</td>
<td>Show energy.</td>
<td>Confirm tasks assigned to attendees and deadline dates.</td>
</tr>
<tr>
<td>Write your objectives and expected outcomes.</td>
<td>Stay focused on the topic. Don’t let attendees distract you.</td>
<td>Send thank you notes.</td>
</tr>
<tr>
<td>Make notes of items to cover.</td>
<td>Check your watch from time to time. Are you on track?</td>
<td>Transfer action items to follow up lists, calendars, and “to-do” folder.</td>
</tr>
<tr>
<td>Start a “Take to Meeting” pile. Coordinate or delegate all logistics.</td>
<td>Post a list of topics to be covered. Have an attendee check them off as completed.</td>
<td>Send necessary information to non-attendees or tell alternate’s team leader.</td>
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</tbody>
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## You As a Meeting Attendee

<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>Get an agenda.</td>
<td>Be on time!</td>
<td>Immediately review your notes from the meeting.</td>
</tr>
<tr>
<td>Do your homework. Research any necessary information.</td>
<td>Position yourself at the table to your advantage. Whom should you sit next to?</td>
<td>Mark any deadline date on your calendar.</td>
</tr>
<tr>
<td>Make a list of questions you have.</td>
<td>Stay focused on the topic. Don’t stray when you speak.</td>
<td>Brief any team members who were unable to attend.</td>
</tr>
<tr>
<td>Find out whether you have to present any information.</td>
<td>Ask questions to clarify what you think you hear.</td>
<td>Write any follow-up correspondence.</td>
</tr>
<tr>
<td>Take your calendar.</td>
<td>Repeat any directions or assignments given to you.</td>
<td>If you are an alternate, let others know what transpired.</td>
</tr>
</tbody>
</table>
Question & Answer Session

- Have a question for the speaker? Press “Star” and then “1” on your phone to enter the queue.

- If, during the Q&A, your question has been answered, or you wish to remove yourself from the queue, press “Star” and then “1.”

- The moderator will open your line when it is your turn to speak.


- We’d love your feedback regarding the conference and other topics you’d like to hear about! Contact Heather Rice at: hrice@BusinessManagementDaily.com.

Thank you for participating!
Thank you for your time and participation today.

Let’s Stay Connected!

Linked In: http://www.linkedin.com/in/joanburge

Twitter: @StarMotivator and @OfficeDynamics

Facebook: http://www.facebook.com/group.php?gid=69785975545

Best Of Luck!

Joan Burge