

# **Getting Control of In-Person and Teleconference Meetings**

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## **I. Introduction**

Meetings can be magical. But they seldom are. Rather than being incubators for effective group brainstorming and problem solving, meetings are often tedious and viewed by participants as an inefficient use of their time. Over the last two decades, I have participated in hundreds of meetings as a lawyer, bar leader, and adjunct professor. At times, I have experienced the magic that happens when participants are fully engaged, have a clear vision for what they hope to accomplish, and are dedicated to making the most of their time together. I offer the recommendations in these materials—which are based on my personal experience and lessons I have learned from others—with the hope that you will find them helpful in your work with bar association volunteers and other bar association professionals.

## **II. Participating in In-Person Meetings**

In-person meetings provide an excellent opportunity for everyone to interact and work cooperatively, but if they are not well-organized or executed, they can lead to frustration and wasted time. Below are suggestions for meeting organizers, leaders, and participants.

### **A. Tips for Meeting Organizers and Leaders**

1. Consider whether you need a meeting. Can the objectives of the meeting be effectively accomplished by some other means? Remember that meetings are an investment—they cost hundreds or even thousands of dollars an hour in employee time (especially when those employees are attorneys who could be billing their time).

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2. Determine the purpose of your meeting. Most meetings are designed to accomplish one or more of three goals: (1) information gathering; (2) information dissemination; and/or (3) problem solving (including policy adoption).
3. Consider who should attend the meeting, as well as who should not attend. Invite only those who need to be there.
4. Create and disseminate a written agenda prior to the meeting. Include a short statement of the meeting's purpose, the start and end times, and a specific agenda that clearly indicates the topics and whether each topic will involve information gathering, information dissemination, problem solving, etc. For example, instead of simply listing "Membership Report," consider using: "Discussion of potential opportunities for and challenges of recruiting law student members."
5. Start meetings on time. Don't penalize those who arrived on time by making them wait for stragglers or by making them listen as the leader repeats information for those who arrive late.
6. The leader should begin by restating the purpose of the meeting. Share your game plan for the meeting, including a statement of the ending time. For example, "I'll start by providing you with some background on the problem we have identified, and then I'd like to spend some time brainstorming about possible solutions. By the end of the meeting, we need to agree on specific suggestions to alleviate the problem and a timetable for implementation of the suggestions. This meeting will end by 3 p.m."
7. Ask someone to serve as the group recorder. The recorder will take notes and prepare minutes of the meeting.
8. Consider asking someone to serve as the group facilitator, especially during brainstorming sessions. This allows the leader to observe, contribute, and not be the focus.
9. When "brainstorming" is appropriate, let it be a true brain storm. All ideas should be welcomed, stated succinctly, and listed on the chalkboard or flipchart for future examination. Discussion and adoption/rejection of ideas is saved for later. After everyone has had an opportunity to offer suggestions during the brainstorm, then go back through the suggestions and decide as a group which ideas deserve the most focus. This can be accomplished by having the group vote on the ideas that they believe are most important, by briefly discussing each idea, or by asking small groups to discuss and then report on specific ideas.
10. Encourage open discussion by directing questions to those who have not contributed. Studies show that participants who are louder, talk faster, and talk more often have the most influence. To ensure that all ideas and viewpoints are explored, and that all attendees feel comfortable contributing, the leader should make sure that one or two individuals do not dominate the discussion. Likewise, leaders must keep themselves in check, being sure to lead the meeting and not dominate the conversation. (If the purpose of the meeting is information dissemination, the leader is likely to talk more. But if the purpose is information gathering or problem solving, the leader should talk less.) If you as the leader want to actively participate in the discussion, rather than facilitate it, consider having someone else facilitate the discussion.

11. Keep the discussion on track. If the discussion strays or becomes stagnant, refocus the group by summarizing points or suggesting new ideas for discussion.
12. Press for closure. Summarize a point or suggestion and try to get the group to commit to action. If a specific action is selected, assign the task to specific individuals and set a timeline. Doing this at the meeting, where the individual accepts the assignment in front of others, will also increase the likelihood that the task will be completed.
13. Reserve a few minutes at the end of the meeting to summarize the discussion and future action, and to set other meeting dates. Tell the group that minutes or a short summary of the meeting will be disseminated promptly (ideally within a few days), and make sure that occurs.
14. Be aware of pitfalls for problem-solving meetings, including the natural avoidance of conflict. Many groups have a tendency to latch on to an idea voiced early in the discussion and then move toward a quick decision in order to avoid disagreements and further discussion. As the discussion leader, make sure that the group considers all the options and explores each fully. Avoid the group's tendency to want to "just get this out of the way."
15. Remember that the most ineffective meetings generally include: (1) vague goals; (2) ineffective leaders; (3) a failure to engage participants; (4) a failure to conclude the discussion; and (5) a failure to decide on action.

## **B. Tips for Meeting Participants**

1. To the extent possible, be prepared for the meeting. Read the agenda and spend a few minutes thinking about your own ideas on the agenda topics. The better the agenda, the more you will be able to prepare in advance.
2. Remember that your performance at meetings greatly influences how other attendees and leaders in the workplace/organization perceive you.
3. If your goal is to actively participate in the meeting (either to advance the agenda or to impress your co-workers and other attendees, or both), recognize that attendees who participate in meetings at the start, especially in the first five minutes of discussion, often have the most influence over the group. Try to contribute something to the discussion, even if it's asking a question, agreeing with a previous speaker, or offering a new idea. Making an active effort to contribute early on will help you remain focused and involved as well.
4. Be a good listener. Show your interest and, where appropriate, provide positive feedback, such as nodding, adding short summaries of others' statements, etc. For example: "Joan has already indicated that she has concerns about costs. I am also worried about money, especially given our loss in revenue. Are there ways we can limit our financial exposure?" As part of being a good listener, limit your use of smartphones and computers so you can fully engage.
5. Recognize that your body language says a lot about whether you are engaged and interested. Your co-workers and others are watching—pay attention to your body language. Participants who are interested, engaged, prepared, and willing to contribute to the discussion tend to lean forward, take notes, nod approval, and smile encouragement when appropriate.

6. If the group leader is not actively seeking the ideas of others, consider whether it might be appropriate to draw others out, thereby becoming a second leader of the group. For example: “Cindy, you told me the other day that you have had problems with billing for that client. Do you think the same problems might be at play here?” The extent to which you take on a leadership role will depend on who is the designated leader; taking over the discussion from your supervisor may not be politically correct. You may need to be subtle. You can also direct questions to the leader, hinting at where the discussion might go.

7. If you agree to take action, be sure you clarify your role and the timetable for completion. Then, complete the job on time. When appropriate, inform the entire group of your efforts. For example, “At last week’s client development meeting, I was asked to prepare a list of potential clients in the gas industry. I found 54 potential contacts in our state; a complete list is attached.”

8. For future meetings, consider talking to the leader ahead of time if you have items to add to the agenda or concerns about agenda items. This allows you to clarify misunderstandings and avoid putting the leader on the spot. The leader will appreciate the advance notice of issues and concerns.

### **III. Participating in Meetings by Teleconference**

Teleconference meetings present their own challenges, especially for the person running the meeting who cannot rely on visual cues to determine if someone wants to speak or if people are ready to move on. Below are general observations about teleconferences and tips for teleconference organizers, leaders, and participants.

#### **A. General Observations**

1. Teleconference meetings *are* meetings. Sometimes participants and leaders take them less seriously than in-person meetings, given how easy it is to “enter” and “exit” the meeting and the fact that no one can see other participants. Teleconferences may require more preparation than in-person meetings, because of the need to manage the conversation without visual cues from participants. Done well, teleconferences can save tremendous amounts of travel time, but done poorly, they can leave participants feeling like they wasted their time and were not heard.

2. Many of the suggestions for in-person meetings apply for teleconference meetings.

3. Most participants expect that the teleconference will be scheduled for a particular period of time and will not run over. Indeed, many participants will schedule other calls and meetings to immediately follow the teleconference, given that there is no travel time required. Because of those expectations, it is important for everyone to pay close attention to the time and pacing of the teleconference.

4. One significant challenge to effective teleconference meetings is the temptation for participants to be distracted by other activities (e.g., email, social media, people stopping by the office, traffic if the person is listening as they drive, etc.). Providing written materials and a clear agenda, moving through the agenda in an efficient manner, and having each participant make a personal commitment to staying engaged are strategies for coping with those temptations.

## **B. Tips for Teleconference Meeting Organizers and Leaders**

1. Have a plan. With everyone calling in by phone, and some distracted by other things going on in their offices, it is all the more imperative that you have a plan for the call. Consider creating a more detailed agenda and planning ahead of time how long you will spend on each item.
2. “Arrive” early. It’s your teleconference—be the first person to call in. This requires you to call in only 5-10 minutes before the actual start time. You’ll be able to take charge of the meeting and avoid having others on the call start discussions without you.
3. Set the tone with a strong welcome. The meeting leader has the ability—by using a strong, cordial, and confident opening—to seize attention and implicitly assure participants that the call will be well-run and end timely. If instead a call seems disorganized or does not start on time, participants are more likely to tune out and focus on other work.
4. Roll call options. If you have twenty or fewer people on the teleconference, you should have a plan to determine who is on the line. One option is to have people announce themselves as they call in and check them off using the expected attendee list. Then, you can do an oral roll call for the people you have not yet heard on the line. Another option is to do a formal roll call. A third option is to ask people to email a certain person to indicate they are on the line; this option works well if you have twenty, thirty, or more people and it’s not practical to have people check in. If you are not sure who is calling in and you have to simply ask who is on the line, consider narrowing the question so that twenty people don’t talk at once. For instance, you could say: “is anyone here from the Northeast? How about the Midwest? The South?” Or, you could ask for those with last names A-K to speak first, and so on.
5. Your role as the teleconference leader is to be the conductor. You’re listening for people starting to speak and making sure you call on people, directing who has been recognized to speak in what order. Give direct verbal cues, such as by stating: “I heard both Michael and Jan indicate they want to speak. Let’s take Michael first, then Jan, then others who want to comment on this issue.” You may also need to monitor your email, in case people are indicating that they are joining, leaving, have a question, etc. Also, because you will not have visual cues to guide you, be prepared to respond if your questions are greeted with silence. For instance, you might say: “Does anyone else want to weigh in on this topic? [Pause] Hearing no one, let’s move on to the next agenda item.”
6. Given the special challenges for those conducting meetings by teleconference, if you want to be a significant contributor—such as by giving a report or arguing for a policy—consider having someone else serve as the meeting leader so you can focus on substance and rather than on who is waiting to speak next.

## **C. Tips for Teleconference Meeting Participants**

1. Arrive “early” or at least on time. Don’t make the other participants wait for you. Worse yet, don’t make the leader feel compelled to repeat everything you missed. It only takes an extra minute to arrive one minute early. Be prompt.

2. Challenge yourself to minimize distractions. Ask your coworkers not to disturb you, make sure you have the meeting agenda and materials accessible to you, and consciously avoid the temptation to give the meeting less than your full attention by using your computer or doing paperwork during the teleconference.
3. Learn how to use the “mute” function on your phone and use it often. This minimizes distracting noises such as typing and traffic that can interfere with the call’s sound quality.
4. Jump in when the leader seeks discussion, but be prepared to pause if others also jump in. You may need to be patient as you wait for the leader to establish the order in which speakers will be recognized.
5. Help out the leader by being willing to vocalize your support or opposition. It’s challenging for the leader when he or she asks a question and the only response is silence. A response such as, “That sounds good,” or “I agree that we can move on to the next agenda item” is helpful to the leader and allows you to establish yourself as an active participant and thought leader.

#### **IV. Other Resources**

There are hundreds of books and articles that offer strategies for planning and running meetings. Below are a few examples.

Harvard Business Review Articles on meetings: <https://hbr.org/topic/meetings>

Popovich, Stan, “10 Tips On Getting the Most Out of Business Meetings,” available online at: <https://www.entrepreneur.com/article/237690>.

Rebori, Marlene K., “How to Organize and Run Effective Meetings,” University of Nevada-Reno Cooperative Extension, available online at: <https://www.unce.unr.edu/publications/files/cd/other/fs9729.pdf>.

Smith, Jacquelyn, “Speak With Impact: 12 Tips For Better Telephone Meetings,” Forbes, June 28, 2013, available online at: <https://www.forbes.com/sites/jacquelynsmith/2013/06/28/speak-with-impact-12-tips-for-better-telephone-meetings/2/#3661021a7a75>.

Thomas, Faith, “5 Tips for Conducting a Virtual Meeting,” available online at: <https://www.inc.com/guides/2010/12/5-tips-for-conducting-a-virtual-meeting.html>.