

# Running Successful Meetings

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Whether in person or virtual, a well-run meeting starts long before your team gathers in a conference room or on a Zoom call. Preparation is key and starts with an agenda (distributed to your attendees well ahead of time) that outlines expectations, roles, time allotment for discussions, and more. Logistics aside, a main goal of leading is to make sure each attendee finds value in the time together and that they have all the information and tools they need to be successful and ready to participate. If you are an attendee, you should show up prepared and ready to contribute.

The following tips will help ensure your meeting is a success:

- **Be on time.** Even better, be 10 minutes. Arriving early or on time shows respect for. For virtual meetings, it's particularly important to allow enough time to log in and test your camera and microphone. If you're unable to attend a meeting for any reason, let the organizer or a team member know that you're unable to participate. And, if you have a role in the meeting, have someone else provide a report or cover you in your absence.
- **Be prepared.** Participants should come prepared by familiarizing themselves with the agenda, objectives of the meeting, and have all material, data, information, talking points, and assignments complete. If you're not prepared to contribute, you're wasting everyone's time.
- **Greet everyone.** Whether in person or virtual, greeting all attendees is important. Allow the meeting lead to introduce you to attendees you don't know. Acknowledge everyone in the room.
- **Follow the agenda.** Never hijack or change the agenda. If you disagree with the meeting agenda or feel something else should be discussed, voice your concern prior to the meeting or, at a minimum, at the start of the meeting. Respect the person who initiated or is leading the meeting.



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#### ABOUT ELEVATE MARKETING ADVISORS

Elevate Marketing Advisors develops marketing and business development campaigns to invigorate your brand, differentiate your firm, and drive business to your bottom line so you stay focused on design and delivery of your discipline.

We are driven to help people and firms realize their beyond through relationship, advocacy, and an elevated client experience.

## Running Successful Meetings, continued

- **Listen and participate.** Be courteous and listen when others speak. Only speak when you have the floor. Don't interrupt someone while they're speaking or asking questions. When you do speak, speak loudly and clearly. Take notes. It's practically impossible to remember each and everything discussed. Also, participate actively – silence equals consent. If you don't agree with something, communicate that respectfully and (ideally) with a suggestion or solution. On virtual calls, mute your microphone when others are speaking to minimize background noise.
- **Focus.** Avoid multi-tasking. Don't bring non-related work to a meeting. Avoid side conversations – it's rude to hold a side conversation while someone is trying to conduct a meeting.
- **Don't save all of your questions for the end.** Ask questions at the appropriate time. Don't be the person who starts questions or add non-agenda items near the end of meeting... Your team members are likely ready to leave.
- **Say "Thank You".** When meeting with co-workers, thank the organizer. A simple "great meeting" or "thanks for getting us together" is appreciated. When meeting with clients or prospects, send a thank you note (or email) to thank them for their time.
- **Follow-through.** Follow-through on your assigned action items. Just as it's crucial to arrive prepared, complete any assignments going forward to meet your deadline.
- **Put electronics away.** Many people keep their phones/tablets on the table during meetings. Professionals, however, don't do this. Even if you aren't looking at your phone, it can be distracting if it starts lighting up or making noises. Put it in your pocket, keep it on vibrate, or leave the room if you absolutely have to take a call or return a text. If you are expecting an important call, let the team you're meeting with know and that you'll excuse yourself when it comes in (sometimes, taking calls is unavoidable). It's rude to text during meetings – your full attention should be on the team and the discussion.
- **Dress appropriately.** If you don't know what attire is appropriate, ask the meeting organizer or someone in your office. Is the meeting at a job site? You can likely dress casually, but you still need to be clean and put together. If the job is at a client office, ensure you are dressed to meet your firm's standards. For virtual meetings things are a little more relaxed, it's safest to dress as you would for an in-person meeting. You can't go wrong if you overdress.
- **No food or gum.** It's always okay to have a beverage on hand but refrain from eating a meal unless it's a lunch meeting. Also, chewing gum during any meeting is distracting and unprofessional.
- **Don't bring surprise guests.** Don't include uninvited guests at a meeting. If you have someone you'd like to include, contact the meeting organizer to get a thumbs up.
- **Be aware of your nervous habits.** Tapping pens, finger drumming, rustling papers, or feet tapping can be distracting to others in the room. Be thoughtful and aware. Distracting actions cause you to appear nervous or bored.
- **Don't bicker.** It doesn't matter how irritating someone is, don't get into a verbal shouting match during a meeting. It's unprofessional and awkward for all attendees. And, never pull rank.
- **Stay until the end.** If you have another engagement and need to leave a meeting early, make that announcement to the organizer and the group at the beginning of the meeting. Then, your leave will be less of a distraction.

*Need help training your team to run successful meetings? Contact Elevate Marketing Advisors today!*