

ABCs of Management Science™ Meeting Preparation

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Overview

- Why Meeting Preparation?
- Understanding the Audience
- Meeting Types
- Meeting Basics
- Meeting Preparation Ah-Ha Take Away
- Meeting Activities
- Meeting Follow-up



Why Meeting Preparation?

- Ensures that meeting objectives are established and communicated
- Improves likelihood of meeting success
- May reduce the number of future, related, redundant meetings
- Provides meeting participations with materials to make them effective in the meeting
- Makes meetings more productive



Understanding the Audience

- Senior Managers – require high-level summarized information, strive to make decisions, and assign resources.
- Middle Managers – want to understand relationship of meeting to workforce, production and processes.
- Team Members – want to understand decisions, direction, and current information.



Meeting Types

- Single Meetings
 - Planning meetings
 - Kickoff meetings
 - Group discussions
 - Orientation meetings
 - Training development
 - Issue resolution
 - Risk planning
 - Communication planning
- Series of meetings
 - Status meetings
 - Testing review meetings
 - Requirements development
 - Training
 - Issue management
 - Risk management



Meeting Basics

- Assure that invitations are prepared with enough time to respond and attend (Check calendars)
- Allow meeting invitees to receive information with enough time to prepare
- Rehearse messages if needed
- Assure meeting room is prepared and supplies and technical items are ready
- Verify attendance, especially for key resources
- Allow the time necessary to define and obtain the objectives



Meeting Preparation Ah-Ha Take Away

Meeting Preparation Form

Directions: Complete this form in preparation of key meetings.

| | |
|--------------------|--|
| Date: | |
| Project Name: | |
| Planned Attendees: | |

| | |
|--|--|
| Meeting Goal #1: | |
| Required Preparation or Instructions: | |
| Desired Outcome: | |
| Time Box: | |
| Steps to follow in the Meeting to Reach Desired Outcome: | |
| Actions Generated / Owner: | |



Meeting Activities

- Welcome and restate purpose
- Follow your agenda
- Provide meeting ground rules
 - Start on time, Leave on time
 - All ideas are good ideas
 - Encourage all to participate
 - Encourage preparation
 - Strive toward reaching your desired outcome
 - Reach closure or Assign Action Item AND Owner!
- Assure notes are taken



Meeting Follow-up

- Review action items
- Distribute meeting notes
- Follow up on action items
- Schedule follow up meetings if necessary
- Update project logs and reports
 - Risk log
 - Issues log
 - Status reports



Contact Us



We provide people and organizations with structure ways to realize opportunities, solve problems and manage more efficiently. We do this through Process, Project and Control Management science.

All questions, comments, improvement ideas or requests for additional information can be directed to:

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