

Avoiding the meeting mire

Internal staff meetings have a bad reputation for wasting time and failing to get things done. Here are some tips on how you can turn your firm's meetings into effective planning tools

BY DWARKA LAKHAN

STAFF MEETINGS CAN SEEM LIKE A necessary evil. When poorly planned and executed, they can be a waste of time, boring and just aggravating. But when tailored to your group's needs and structured properly, staff meetings can be invaluable tools for timely communication, planning and even inspiration. Ideally, meetings should help to align the individual goals of team members with those of your overall practice.

George Karkoulas, president of the private client group with **Hampton Securities Ltd.** in Toronto, says meetings help to avoid the fallout when information sloshes around a workplace in an uncontrolled, potentially destructive fashion. Meetings "allow you to disseminate the same message to all staff members," he notes, reducing or eliminating the possibility of staff members drawing inaccurate conclusions about what's happening at the firm. "Staff appreciate you're taking the time to make them aware."

Staff meetings can be classified into three broad categories: operational; project-specific; and business planning or strategy meetings, says Caroline Grimont, vice president of marketing with **Excel Funds Management Inc.** in Mississauga, Ont.

The most common are meetings held weekly or biweekly to discuss a range of

ongoing operational matters, such as marketing, sales, business processes, client services and administrative issues.

Project-specific meetings usually are held less frequently, often monthly, and focus on updating and monitoring specific projects.

Business planning or strategy meetings typically are held quarterly or semi-annually, and address strategic, tactical and planning issues.

Although the format of a meeting depends upon its purpose, here are some general ground rules that can contribute toward having efficient, productive staff meetings that motivate rather than frustrate staff:

● PREPLAN MEETINGS

Staff spend a lot of time in meetings, making preparation essential. Grimont suggests you decide what will be covered and the outcomes you would like to achieve. These decisions should be made with input from appropriate staff.

Francis D'Andrade, vice president, private client services with **Hahn Investment Stewards Inc.** in Toronto, recommends inviting staff to meetings based on the functions they perform rather than their titles. This ensures that the subject of the meeting is relevant to participants. In addition, always have a relevant decision-maker at

meetings. For regular meetings, set formal start and end times and establish a specific place. This reduces the need for reminders.

● SET AN AGENDA

Always have an agenda, Grimont recommends. It must support the purpose of the meeting and should be tight and focused.

D'Andrade recommends having no more than three items on your agenda. You should ensure that meeting participants have input into what is on the agenda and inform them of any preparation that might be necessary prior to the meeting.

"To make meetings more efficient, circulate any documents that must be reviewed prior to the meeting," Karkoulas says. "The worst thing you can do is to broadside staff for input when they are at a meeting."

For business planning and strategy meetings, notify staff and ask for input at least two weeks in advance, as these meetings typically require more complex preparation.

● BE RESPECTFUL OF STAFF'S TIME

Always start and end meetings on time. D'Andrade recommends keeping them as short as possible. More important, set ground rules for all meetings. D'Andrade suggests appointing informal leaders for specific initiatives, with the aim of reducing lengthy discussions at meetings.

If this route is chosen, assign tasks based on skill sets, Grimont advises. This helps to ensure accountability.

Karkoulas suggests that staff not be allowed to use personal electronic devices at meetings, as the devices can be distracting.

● MODERATE DISCUSSIONS

Meetings get off track because some staff spend too much time on hot topics. It's the duty of the person chairing the meeting to cut off these discussions politely, says Grimont, and prevent some individuals from dominating meetings and inhibiting the participation of others. By allowing everyone to participate, all staff become invested in the success of what you are trying to achieve.

● FOLLOWUP

Grimont recommends setting deadlines for followup at subsequent meetings. Action items should be defined, along with who is responsible for each item and the timing of deliverables. Grimont suggests maintaining a spreadsheet that itemizes and prioritizes all tasks, which should be circulated to staff to ensure that they are aware of agreed-upon goals and tasks.

Karkoulas adds that people tend to take what needs to be done more seriously when they see it in writing.